

MIDUS



Midlife in the United States

A National Study of Health & Well-Being

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Field Report for MIDUS Milwaukee Oversample

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OVERVIEW OF PROJECT

A specific aim of the Midlife in the U.S. National Study of Health and Well-being (MIDUS) during the second wave of Project 1 data collection was to recruit an African American oversample to participate in a field interview and questionnaire paralleling main sample instruments. This data collection was conducted by the University of Wisconsin Survey Center for Professor Carol Ryff of the University of Wisconsin Institute on Aging. Production interviewing began on March 30, 2005 and ended June 29, 2006.

For the in-person survey, a total of 592 interviews were completed. A total of 398 self administered questionnaires (SAQs) were completed, and 307 cognitive interviews were completed. Detailed information is reported in the response rate section of this document (See Appendix A).

The overall response rate for the in-person interview was 70.7%. The overall SAQ response rate was 67.2%. The phone survey administration of the Telephone Assisted Cognitive Testing (TACT) had an overall response rate of 51.8%. Full discussion of the response rates for all of these portions of the MIDUS 2 Project 1 Milwaukee oversample are reported in the response rates section of the appendix document (See appendix A).

The University of Wisconsin Survey Center

The UW Survey Center (UWSC) is a unit of the College of Letters and Science at the University of Wisconsin-Madison, and is supported by the College, the Graduate School, and revenue generated from contractual work. Professor Nora Cate Schaeffer is the Faculty Director of UWSC. John Stevenson is the Associate Director. Steven Coombs is the Field Director. Kelly Elver served as Senior Project Director on this project. Kerryann DiLoreto Oliver served as project director for the Milwaukee oversample data collection. Other key UWSC staff included:

- Wes Taylor, MIDUS CASES programmer. Responsible for instrument programming and data delivery.
- Robert Breen, Tracking/Locating Supervisor. General oversight of tracking locating operations.
- Marilyn Gannon, MIDUS Tracing Contact.
- Lisa Klein, Joe Degnitz, Phone Room Supervisors. Responsible for hiring and training interviewing and shiftleader staff. General oversight of CATI projects and staff.
- Nathan Condella, MIDUS mail room coordinator. Responsible for preparing all mailings of payments, SAQ's and letters to MIDUS respondents.
- Ken Croes, UWSC mail room supervisor. Responsible for staffing and training of all mail room and data entry staff.

CASES Instruments

In-person interviews were conducted using CAPI (computer-assisted personal interviewing) technology. The CAPI system used by the Survey Center is CASES. This system is copyrighted by the University of California-Berkeley's Computer-Assisted Survey Methods Program or CSM.

For the phone survey administration of the TACT instrument, interviews were conducted using CATI (computer-assisted telephone interviewing) technology, also in CASES.

In the CASES CAPI and CATI systems, the text of the survey appears question by question on a computer screen for the interviewer to read to the respondent. Routing through the interview is based on skip logic pre-programmed into the computer. Question wording may be adapted according to answers given previously in the interview. The system allows for pre-coded questions, open-ended questions, and combinations of the two. In addition, the computer allows only valid responses; when an invalid response is entered, the computer asks the interviewer to reenter the response. The system also keeps track of the current status of all sample telephone numbers and automatically routes them for proper follow-up for the next attempt, and maintains an elaborate set of management records.

The CAPI instrument for the Milwaukee oversample project employed ACASI (audio-computer administered self-interviewing) technology. This allowed respondents to listen to questions read by a pre-recorded human voice via headphones and then privately record their answers using the computer keyboard. The ACASI section of the instrument facilitated the administration of sensitive and especially personal questions.

BACKGROUND

The Milwaukee oversample project was conceptualized as a pilot to address limitations of minority representation in the original MIDUS sample. The city-specific oversample was designed to facilitate inclusion of minority respondents in the biological data collection. The Milwaukee oversample was stratified by age, gender, and income.

MIDUS Milwaukee Oversample

Instrument Development

The UWSC's work on the in-person interview for MIDUS Milwaukee began in January of 2005. UWSC staff met with PI Carol Ryff and other key UW-IOA personnel to discuss the instrument. The Milwaukee CAPI instrument and Milwaukee SAQ were crafted from the Wave 2 main (longitudinal sample) telephone instrument and main sample SAQs, with some modifications.

The UWSC received the CAPI instrument from the IOA in Microsoft Word, and used this, along with previously programmed main sample instrument files to begin programming. Revisions to the CAPI instrument were made by February 2005 and testing and debugging began.

Some question items that had been administered by phone for the main (longitudinal sample) were converted to SAQ items for the Milwaukee oversample. Conversely, some items that had been administered by SAQ for the main sample were converted to CAPI items for the Milwaukee oversample.

The Milwaukee SAQ file was received from IOA in Word. UWSC used main (longitudinal) SAQ files already formatted in PageMaker to create the final Milwaukee SAQ. Extensive changes were made to create files for use by UW Printing. At this time all of the pages of the SAQ were turned into PDFs for ease of printing.

In final form, the Milwaukee oversample CAPI instrument was a substantial two hour long interview, while the SAQ was 50 pages.

MIDUS Milwaukee benefited from prior development, testing, and production of the TACT instrument for conducting main (longitudinal) sample cognitive interviews. The TACT instrument was not modified for conducting interviews with Milwaukee oversample respondents. As with main sample data collection, the Milwaukee oversample cognitive data collection involved digital recording of the entire interview. The end product of this recording process was a set of digital wave files that could be listened to, analyzed and scored entirely on the computer at a later date by the research team at Brandeis.

Pretests: CAPI interview, Self Administered Questionnaire

A full pretest of the CAPI and SAQ was completed in the early spring of 2005 for the Milwaukee oversample. Households were listed in randomly selected census blocks in Milwaukee county. From these, a total of 24 respondents were recruited to complete the CAPI interview. The CAPI interviewer left behind the 50-page SAQ for the respondent to return by mail. A total of 12 respondents out of 24 sent back their completed booklets. Milwaukee oversample pretest cases

were not flowed into the cognitive interview given that it had already been thoroughly tested for the main MIDUS sample.

Non-personalized advance letters were sent to everyone in the pretest sample after the households in the selected census blocks were listed. UWSC tested using \$40 in cash as a post-incentive to participate in the CAPI interview. In addition, UWSC tested using a \$20 check as a post-incentive for completing the SAQ. These respondents did not know that they were pretest respondents and assumed they were part of the larger production Milwaukee oversample.

After the pretest, debriefing sessions were held with pretest interviewers and further adjustments were made to the instrument. All of the data from these pretests was delivered to the UW IOA staff during the spring of 2005, and minor programming changes were made to the CAPI interview and SAQ instruments after pretesting was complete. Final production instruments were then prepared for fielding.

THE MIDUS Milwaukee Oversample

Listed Sample

UWSC contracted with a sampling statistician and consultants from the University of Illinois Research Lab (UIRL) to develop a plan for listing a sample in Milwaukee County. The sampling design was a stratified area probability sample of households in Milwaukee County. The sampling frame included census tracts in which at least 40% of the population was African American. The census blocks were stratified by income, with roughly half coming from tracts in which the median household income is \$40k or greater, and the rest coming from tracts in which the median household income was below \$40k.

The UIRL statistician sent the census tracts to Genesys to receive ADVO files to aid in the listing of households. UIRL consultants trained UWSC staff on the protocols and procedures of block listing. A pretest of listing procedures was done in early 2005.

For the production phase, UIRL provided UWSC with 99 census blocks. 35 blocks were designated as lower income while the remaining 64 were designated as upper income. Of these blocks, 20 were designated as “backup” to be listed and fielded only if necessary. Of these 20 backup blocks, 10 were designated as lower income and 10 as higher income.

Over the course of the production field period, all 64 upper-income census blocks were listed and fielded. Only 14 of the 35 lower-income census blocks were listed and fielded to satisfy the stratification design for race, age, and gender.

In total then, 78 of the 99 census blocks selected were listed and fielded for production. Listing of these blocks revealed 3565 households to screen for race, age, and gender.

Screening / Sample Selection

The original goal of this project was to complete interviews with 400 African American residents. The priority was to fill the quota cells for each group. In the process, we expected to exceed 400 completes as necessary. The sample was to be stratified by age, gender, and SES, with 50 completed interviews in each of the eight cells. The original sample stratification design is presented in Table 1.

Table 1. Goal Sample Sizes by Stratum

	Median HH Income <40k		Median HH Income >=40k		Total
	Male	Female	Male	Female	
Age 35-54	50	50	50	50	200
Age 55-85	50	50	50	50	200
Total	100	100	100	100	400

In order to interview respondents according to the quota cells, UWSC screened all of the 3565 households that were found by listing the census blocks. Of the 3565 households fielded, 419 were eventually determined to be non-sample (vacant, not an actual housing unit, etc.). Of the 3145 households that were screened for eligibility by age and gender, 2308 were found to be ineligible.

Thus, the overall screen-out rate was 73.4%. In other words, of the 3145 households screened for eligibility, only 26.6% were actually eligible by age and gender for the CAPI interview.

As the field period progressed, some of the quota cells became filled. In order to focus field resources on unfilled quota cells, the screening criteria were adjusted accordingly. At this point, 321 households were screened out as quota filled. A detailed breakdown of the outcomes after screening and interview attempts is as follows:

During production in the field, as hypothesized, females were more prevalent in the sample, were more likely to be at home, and were more willing to participate than men. This was especially true of women living in census tracts that were designated as lower income. The oldest respondents were the most challenging to find and secure participation. The final result of screening and interviewing can be seen in Table 2 below:

Table 2. Actual Completed Interviews by Stratum

		Median HH Income <40k		Median HH Income >=40k		Total
		Male	Female	Male	Female	
Age 35-54		75	144	64	75	358
Age 55-85		46	111	37	40	234
Total		121	255	101	115	592

Screening Matrices

In total, four screening forms were in use simultaneously by interviewers during the field period. These 4 forms were randomly attached to coversheets that represented listed households. Interviewers used the attached screening form to screen the given household for eligibility.

The four screening forms each had a specially designed matrix that the interviewer would follow to decide who among eligible household members to select for participation. These matrices were designed to efficiently screen for participants to fill the quota cells. The matrices were designed in the Trodahl-Carter style.

The screening matrices were adapted partway through the field period when some of the quota cells became filled. This meant that the four original forms were retired and replaced with four new versions that more efficiently screened for participants for the unfilled quotas. In total, the project employed 8 forms. (See Appendix B.)

Sample Input files

Given that respondent selection happened at the door via the screening forms, the MIDUS Milwaukee CAPI interview did not employ sample input files. Only the case id for a given household was pre-assigned, prior to the household screening. Once a respondent was selected in a given household, the interviewer drew up the case id assigned to that household and started the interview. It was at this point that the interviewer collected, for the first time, the respondent's full name, date of birth, and other crucial information that otherwise might have been pre-loaded.

TRACING

UWSC created a tracing / administrative database using the ADV0 lists prepared by Gensys and the UIC statistician. Household / case-level information was appended as census blocks were listed. Cases were assigned codes according to the outcomes of the screening process, or later when the interview attempt

was resolved. The database expanded to accommodate case-level information about SAQ participation, incentives paid, and administrative notes.

Although a non-personalized advance letter to households was sent prior to screening, letters that were returned to UWSC were not traced. For the most part, interviewers were attempting to screen households very shortly after letters would have arrived. If an informant at a given household did not recall receiving the letter, the interviewer provided another on the spot.

Tracing was not relevant during the CAPI phase because the household was the sampling unit and interviewers made multiple attempts to screen the household for eligible respondents. Once eligible respondents were identified, the interviewer would follow-up in person until the interview was completed or the case was otherwise resolved.

During the SAQ Phase

Tracing commenced for the Milwaukee oversample when Wave 2 SAQ booklets were returned to UWSC as undeliverable. (Wave 1 booklets were handed to the respondent at the end of the CAPI interview). The cases for which Wave 2 booklets were undeliverable were traced by UWSC's Tracing and Locating department using protocols established for the main MIDUS sample.

The tracing / administrative database was then updated with new information, including address and phone number.

Fields were added to the data base that allotted space for tracers to enter updated information. As new phone or address information was obtained, old information was moved to other fields so that a log of changes was stored.

Also during the SAQ phase, the tracing department handled cases where the incentive check for completing the booklet was returned undeliverable. The respondent was traced for new contact information so that the check could be resent.

At the conclusion of the SAQ phase, only 14 Milwaukee oversample cases resulted in a final code of undeliverable / unable to locate.

During the Cognitive Interviewing Phase

The Milwaukee oversample cases posed some challenge when moving into the cognitive interview phase because this was the first point at which UWSC attempted to contact the respondents by telephone. During the CAPI phase, some Milwaukee respondents did not provide a phone number. Although we attempted to collect phone number in the CAPI instrument, some respondents

refused or simply did not have a phone. Cases like this had to be sent to tracing before they could be called for the cognitive interview. In cases where the respondent did not have a telephone, we were not able to complete the cognitive interview.

Once calling began, cases that resulted in wrong numbers, disconnected numbers, or faxes were sent back to tracing for a re-trace. Cases were also sent to tracing when an informant at the number knew the R but claimed they no longer lived at the address, and would not provide updated contact information. Cases that were called 20 times without contact were also sent to tracing, and this was done repeatedly for some cases.

FIELD PROCEDURES

Several meetings were held with IOA staff to approve UWSC's suggested field protocols. UWSC consulted with the UIC primarily about listing procedures but also about hiring CAPI interviewers and running the project in the field. Procedures for the SAQ and Cognitive interview portions had already been vetted in-house at UWSC for the main MIDUS sample, so the Milwaukee oversample benefited from tried and true protocols. UWSC Phone Room supervisor Lisa Klein and her staff, as well as Mail Room supervisor Sarah Pluck, and head of Tracking and Locating Bob Breen were involved during the main sample production and remained in place when the Milwaukee sample was fielded.

Most procedures and protocols were targeted to CAPI interviewer staff and the unique challenges of working remotely in the field. Staff based in-house at UWSC dealt with only a few issues specific to MIDUS Milwaukee.

- 1). How would the phone room handle the number of potential call-ins from respondents if a toll-free number was included in an advance letter?
- 2). How would the mail survey department handle assembly and preparation of special, complex persuasion and conversion materials for dissemination to CAPI interviewers in the field?
- 3). How would monetary incentives be handled – both cash incentives that CAPI interviewers gave to respondents at the conclusion of the CAPI interview, and check incentives mailed to respondents when UWSC received completed SAQs?

Toll-Free Respondent Line and CAPI Interviewer Cell Phones

To maximize opportunities to make contact with respondents, the toll-free line created for the MIDUS main sample was retained for use with the Milwaukee

oversample. This line was distinct from the general Survey Center toll-free number in use for other studies in the field and was available only for MIDUS purposes. A voicemail box was set up on this phone number in the event that phone room staff were not available to answer the phone. A recorded message instructed callers to leave a message if they were calling about receiving the advance letter, or regarding a payment question. Messages regarding payment were forwarded to Nathan Condella, the MIDUS mail coordinator handling respondent payments. The toll-free number was included in advance letters sent to all MIDUS participants and was provided by the CAPI interviewer upon request.

During the field period, CAPI interviewers were provided with a UWSC-issued cell phone. CAPI interviewers provided their cell phone number to households and respondents during the screening and interviewing phase. Respondents were encouraged to call interviewers directly on their cell phones if they had any questions or concerns. Interviewers reminded respondents that the toll-free line was available as well.

Advance Letters

To introduce potential respondents to the study, and to prepare households for a visit from a CAPI interviewer to screen for eligibility, advance letters were mailed to all listed addresses in a given census block. The project director timed the mailing of letters to given blocks according to when interviewers would be ready to actually visit that block to screen households. Letters reached households one week prior to receiving a visit from an interviewer. In this way, interviewers were not doing “cold-calls” to homes.

The letter itself was not personalized given that it was only after the interviewer determined eligibility and selected a respondent in the household that we learned the full name of our respondents. The letter described the MIDUS study and explained that an interviewer would be visiting their household to screen for eligibility. The backside of the letter contained an “FAQ” list to summarize key points.

Coversheets

To log interviewer visits to households and track a case in the field, UWSC used paper coversheets. Interviewers were given their caseload by receiving coversheets from the project director. Each coversheet represented a listed address. A screening form was attached to the coversheet itself. The four different screening matrices employed at the start of the field period were represented on four separate forms. A screening form was attached to a

coversheet randomly to ensure that the Trodahl-Carter method would be successful for screening households into the stratified quota groups.

Only a pre-assigned case id and a listed address were printed on the coversheet, along with an indicator for census tract and block. The standard UWSC paper coversheet visit log comprised the rest of the page. It was on the log lines of the coversheet that interviewer recorded the times and dates of their visits to households and the outcomes of those visits.

Survey Protocol

Like the MIDUS main sample, the Milwaukee oversample was complicated to field due to the fact that the CAPI interview, mail survey, and cognitive phone survey were all taking place simultaneously, with different respondents at different points in the survey at all times. Some respondents went on to complete their mail survey within days of finishing the CAPI interview, while others took months to complete the mail survey. The basic protocol was as follows.

- 1). A listed household / address was sent an advance letter telling them about the MIDUS Milwaukee study and receiving a visit from an interviewer to screen for eligibility.
- 2). After one week, an interviewer visited the address to confirm that it was a household and to screen for eligible potential respondents. If members of the household indicated not receiving or seeing the advance letter, the CAPI interviewer provided another copy. If an eligible respondent was available to complete the interview on the spot, the 2-hour survey was started.
- 3). When a completed CAPI interview was obtained, the interviewer presented the respondent with a sealed envelope containing \$50 in cash. The respondent opened the envelope in the interviewer's presence to confirm the amount and sign to acknowledge receipt of the cash.
- 4). Once the respondent received the cash incentive, the interviewer handed over a 50 page SAQ booklet, as well as a letter explaining how to fill it out, and a business reply envelope for the respondent to send the completed survey back in. The interviewer listened for the respondent to indicate needing help with the task of filling out the SAQ (perhaps due to illiteracy), and offered help accordingly.
- 5). When the respondent sent back their completed SAQ, they were mailed a check for \$20.00 within one week.
- 6). Approximately one week after the payment for the mail survey was sent, cases were fielded for the Cognitive telephone survey.

- 7). No additional incentives were paid for the Cognitive survey.
- 8). One week after the SAQ survey was mailed out, a postcard was sent to encourage the respondent to fill it out and send it back.
- 9). If a respondent did not return the SAQ within 4 weeks of receiving it, another wave (wave 2) of the SAQ was sent, with all the same materials as the first wave but with a shorter, more direct coverletter.
- 10). If a respondent had not returned their completed SAQ within 3 weeks of the second wave of the mailing, they were sent another full mailing (wave 3). The coverletter for the wave 3 mailing explicitly offered to respondents the assistance of an interviewer in filling out the SAQ. Respondents were encouraged to call the toll-free line to request assistance or to call their interviewer from the CAPI portion. A token incentive, post-its with the MIDUS logo and toll-free number, were enclosed in this mailing.
- 11). After all three waves of SAQ had been sent, if 3 months had elapsed from the time of the CAPI interview (when the wave 1 booklet was handed to the respondent), the case was moved to the "SAQ Completion Drive Effort". For this effort, when possible, the interviewer who originally completed the CAPI interview with the respondent attempted to visit the respondent at home to inquire about the status of the SAQ. At this point, interviewers offered assistance to help fill out the SAQ on the spot. During this effort, interviewers found that some respondents had started to fill out the booklet but laid it aside after finding it cumbersome and tiring. If the respondent no longer had the SAQ, interviewers carried extra copies.
- 12). Before cases were fielded for the Cognitive survey, if the case was not resolved via the SAQ Completion Drive effort, a final fourth wave of the mail survey was sent to them, which included a package of post-it notes with the MIDUS logo and toll free number on it, along with a letter requesting their participation.
- 13). Two weeks after sending this mailing, fielding of cases for the cognitive survey began, even if the respondent had not mailed back their SAQ.
- 14). Given that the CAPI interview instrument and Milwaukee SAQ instrument already differed from the main sample instruments, IOA decided against creating a telephone version of the SAQ. While this had been done for the main sample SAQs with great success, unique features of the Milwaukee sample indicated that creating a telephone version of the Milwaukee SAQ was not worth additional time and resources.

Mortality Closeout Interviews

Mortality Closeout interviews were not implemented for the Milwaukee Oversample project.

Refusal Protocol

Standard protocol at the UWSC is to hold a case that has refused for at least two weeks before attempting a conversion. This strategy was applied to MIDUS Milwaukee CAPI cases when a respondent refused. When refusals occurred at the door of an unscreened household, before the resident even knew who was visiting, or if an informant refused on behalf of the household with little information about who we were, we continued to revisit the household. Interviewers would attempt to leave their business card and/or a copy of the advance letter so that by the time of the next visit, residents would make the connection and understand our visit.

If this type of refusal continued, usually with the residents not coming to the door, the project director would re-assign the case to a different CAPI interviewer. Some attention was paid to re-assigning the case to an interviewer of different race or gender as a way of accommodating preferences of potential respondents.

If residents of the household understood who we were and the purpose of our visit, but refused to be screened for eligibility, the project director would re-assign the case to another interviewer for follow-up attempts.

When a household refused participation after being screened for eligibility and the interviewer had determined that eligible respondents did indeed reside there, the case was set aside for at least two weeks, and then the case was re-assigned by the project director to a different interviewer. The project director used notes left on the coversheet by the original interviewer who received the refusal to determine what interviewer characteristics might be best suited for each case.

If a re-visit attempt by a different interviewer was not successful, the case moved into a special refusal conversion effort designed for the Milwaukee oversample. This was a three-pronged approach to tackle eligible respondent refusals, as well as households that were persistently unavailable for screening. This approach took advantage of the fact that we knew the approximate, broad income level (above or below \$40K) of the census tract in which each block was located. Given interviewer observations that respondents of different approximate income level were refusing for different reasons, the three-pronged approach was as follows:

- A glossy UW folder with a unique letter and a copy of D. William's article was used as a conversion treatment for (Census-designated) upper-income non-respondents.
- A MIDUS stress ball in a USPS Priority mailing box with a unique letter for lower-income respondents.
- A different persuasion letter was mailed along with MIDUS post-its to upper and lower income persistently unavailable households (not yet screened for eligibility).

One week after respondents received one of the above treatments by mail, yet another CAPI interviewer visited the household in an attempt to gain participation. If the respondent or informant did not recall receiving or seeing the mailing, the interviewer would present a copy (the folder, stress ball, or post-its). Interviewers were trained to use their judgment to present a different token incentive as was mailed if they saw fit.

Respondent Payments

Respondent payments were discussed in sequence in the field protocol section, but to recap, respondents received \$50 in cash after completing the CAPI interview. They were then mailed a \$20 check after UWSC received their completed SAQ. No additional incentive was included for the cognitive phone survey portion, as respondents had received a check for their mail survey completion only a week before we began calling them to complete the cognitive survey. The check mailed following the SAQ provided the MIDUS toll-free number so that respondents could call if they did not have the resources to actually cash the check. This happened in only a handful of instances and UWSC either mailed or hand-delivered a postal money order to replace the check.

CAPI Interviewer Training

UWSC drew from an existing pool of CAPI interviewers who had worked on previous projects to fill six of the twelve interviewer slots for the MIDUS Milwaukee project. The remaining six slots were filled with new hires that had other previous interviewing experience.

Interviewers new to UWSC received 8 hours of training on basic standards and procedures. After that training, the new hires joined with the UWSC veteran interviewers to receive an additional 24 hours of training specific to MIDUS issues and the MIDUS Milwaukee instruments. Interviewers learned how cases would be fielded, how to screen households and select respondents, how to take physical measurements for the health module of the instrument, fieldwork

guidelines, and protocol for refusals. They also completed a “walk-thru” of the main CAPI instrument. Interviewers were given time to practice the interview on their own, and were instructed to complete three practice cases before they began to visit actual respondents. New hires were shadowed and mentored in the field by a veteran interviewer for their first few actual interviews with respondents.

The CAPI interviewer training for MIDUS Milwaukee took place at UWSC’s Mifflin office from March 28, 2005 through March 31, 2005. Carol Ryff attended a session of the training, and was helpful in motivating the interviewers and providing them with sufficient background information to help them be very convincing to MIDUS respondents. She talked about the previous wave of data collection, the purpose and design of the study, and the goals for the Milwaukee oversample in particular. Dr. Ryff also shared information about projects 2-5 with interviewers to help them understand the full MIDUS survey and how the portion they would be working on fit in.

The CAPI interviewer training also benefited from a talk given by Dr. David Almeida from Project 2 that was encouraging and further underscored the importance of quality work during Project 1 to ensure success for subsequent projects.

Interviewer Observation Forms

In order to minimize burden on the respondent while hosting the interviewer in their home, the typical interviewer observation questions that follow each completed interview were not programmed into the CAPI instrument. Instead, the interviewer observation questions were printed on paper copies that interviewers would carry with them and attach to a coversheet once the interview was underway.

The ACASI sections in the CAPI instrument provided downtime for the interviewers while the respondent took control of the laptop to complete these sections. During this downtime, it was appropriate for the interviewers to “give space” to the respondents to complete the ACASI sections privately and at their own pace. Thus, during downtimes, interviewers looked busy by completing administrative tasks related to the case, such as completing the interviewer observation form. Initially the form was only 4 pages long, but was extended to 7 pages when Dr. David Williams added some specific race and cultural questions about the household for the interviewer to answer.

These interviewer observation forms were data entered separately from the CAPI interview data and from the SAQ data. These forms contained some open-ended items where interviewers stated their observations about the respondent, the household, and the neighborhood where the household was located. While

interviewers were trained to be as objective as possible when answering questions on the form, some subjective views did creep in. The data from these forms was delivered to IOA without censure or editing.

Verification Interviews

UWSC employed “verification interviews” to follow-up on a random selection of at least 10% of each interviewer’s completed cases. A trained specialist re-visited the household where an interview took place to confirm key details about the respondent, the circumstances of the completed interview, and that the respondent had been treated with utmost respect and care. These verifications served as our monitoring, feedback, and “customer service” mechanism during the field period.

Re-training and Remote Office

UWSC set up a remote office in downtown Milwaukee, at which the project director met staff one day each week during the field period. Interviewers were required to report to the remote office on a weekly basis for paperwork exchange, materials, data transfer and other administrative business. In this way, interviewers interacted with the project director and colleagues to debrief, and stay up-to-date with protocol and procedures.

At the midpoint of the field period, UWSC organized an all-team meeting to re-train and re-focus interviewers. This 5-hour meeting took place in a conference room at a hotel in Milwaukee. The keynote speaker was Dr. David Williams, a MIDUS investigator, who presented some of his research on Health and the Quality of Life of African Americans. This served as a boost to interviewers to re-invigorate their commitment to the study and as an introduction to Dr. William’s article that we would be providing to respondents in our Persuasion and Conversion effort described in the Refusal Conversion section of this report.

Cognitive Interviewer Training

During the main sample Cognitive interviewing phase, staff at the UWSC developed an extensive training regimen for telephone interviewers. By the time Milwaukee oversample cases made their way to the Cognitive interview, a solid and successful production protocol was in place.

(See the main sample field report for a detailed description of the interviewer training for Cognitive interviews.)

Data Entry Protocol and Staff Training

Data entry for the MIDUS Milwaukee SAQs began in April of 2005. The SAQ booklet was 50 pages long and contained items from the main sample telephone interview as well as the main sample SAQs. The booklet included every possible type of formatted question, making them quite complex to enter. Following the main sample SAQ protocol, each booklet was first reviewed by an “editor” to uncover any issues that could cause data entry confusion and resolve these issues before they went to data entry. Editors received separate training from main data entry staff. They were given an editor protocol booklet (see Appendix J of the main sample field report), and were trained on how to resolve the most common problem issues, such as respondents that gave multiple answers, selected answers that fell between actual response categories, or followed skip patterns incorrectly.

Data entry staff also underwent 1 hour of MIDUS specific training to make them familiar with the instrument, train them in the specific protocols set for the project, and give them an opportunity to practice and ask questions about the data entry process. (See Data Entry Specifications Manual in Appendix K of the main sample field report). Each booklet was blind entered by two different data entry staff members. When a discrepancy between the first pass and the second was found by the computer, the data entry person was alerted to the difference in responses, and they then determined the correct answer (with help from an editor if needed) and then made the correction to the error, either from the first or second pass. Analysis of the number of changes required by second pass interviewers showed a data entry error rate of less than .5 percent for all data entered.

INTERIM AND FINAL DATA DELIVERIES

Delivery of Contact Information

The UW Institute on Aging required installments of updated contact information for all respondents, including those in the Milwaukee oversample. This data base came to be known as the shell database, as it was completely designed by the IOA staff with all of the variables they would need for this purpose, but contained no data until the UWSC populated the tables in the data base and sent installments of cases to IOA in this “shell”.

Shell deliveries of Milwaukee oversample respondent information largely followed the same conventions established by such delivers for the main sample. (See the main sample field report for background on the development and execution of these deliveries.)

Delivery of Interim Data Files

In April of 2005, less than one month after production calling began, UWSC delivered an interim data set of the first 20 cases to complete the CAPI interview, so that IOA staff could review and be sure all variables were being asked correctly. A week later in April of 2005, another delivery of an additional 97 complete CAPI cases to was made to IOA. In late September of 2005, SAQ data for the Milwaukee oversample was delivered. Cognitive interview data for the Milwaukee oversample was delivered with main sample cases concurrently.

Barry Radler of the IOA completed extensive data cleaning efforts in collaboration with the UWSC at that time so that all labeling was complete for the data set, and all variables that needed to be reviewed for the final data set had been identified. This finalized the protocols for final data set cleaning and delivery.

Final Data Deliveries

Final data delivery for the Milwaukee oversample CAPI data took place in October 2005. This delivery consisted of 592 cases. Final data delivery for the mail and cognitive portions of the survey took place in October and November of 2006 respectively, after all “straggler” cases (those who completed the SAQ very late or completed the Cognitive survey in the fall of 2006) were completed.

Appendix A

MILWAUKEE AFRICAN-AMERICAN OVERSAMPLE

Field Report

Response Rates Across Data Collection Phases

Type of Sample	Main CAPI Survey	SAQ Survey	Cognitive Survey
Milwaukee Over Sample	70.7%	67.2%	51.8%

255 respondents participated in all three phases (CAPI, SAQ, Cognitive)

398 respondents participated in CAPI and SAQ but not Cognitive

52 respondents participated in CAPI and Cognitive but not SAQ

Detailed Breakdown: Main CAPI Survey

Actual Completed Interviews by Stratum

			Median HH Income <40k		Median HH Income >=40k		Total
			Male	Female	Male	Female	
			Age 35-54			75	
Age 55-85			46	111	37	40	234
Total			121	255	101	115	592

The response rate denominator for the in-person survey reflects the total number of households (HH) screened for eligibility minus the number of those households which screened out or were eventually coded out when quota groups (by age and gender) were filled. Thus the response rate calculation for the in-person survey was:

592 (Number of completes)

838

[3565 (total HH fielded) - 2727 (HH screened out as ineligible or coded as nonsample) = 838]

The overall response rate for the main in-person interview was 70.7%.

Final Disposition Codes for MIDUS Milwaukee CAPI Phase

Interview		(1.0)	592
	Complete		592
	Partial		0
Eligible, Non-Interview		(2.0)	210
	Household -level refusal	2.111	59
	Known respondent refusal	2.112	69
	Break-off	2.12	0
	Non-contact	2.20	0
	Unable to enter building/reach housing unit	2.23	0
	No one at residence	2.24	0
	Respondent away on vacation/out of country	2.25	0
	Persistently unavailable – screened-in	2.27	52
	Other	2.30	2
	Dead	2.31	1
	Physically or mentally unable/incompetent	2.32	27
	Household -level language barrier	2.331	0
	Respondent language barrier	2.332	0
	Miscellaneous	2.35	0
Unknown eligibility, non-interview		(3.0)	36
	Unknown if housing unit	3.10	0
	Not attempted or worked	3.11	0
	Unable to reach/unsafe area	3.17	0
	Unable to locate address	3.18	0
	Housing unit/Unknown if eligible respondent	3.20	36
	Other	3.90	0
Not Eligible		(4.0)	2727
	Out of sample	4.10	22
	Not a housing unit	4.50	61
	Business, government office, other organization	4.51	9
	Institution	4.52	0
	Group quarters	4.53	1
	Vacant housing unit	4.60	323
	Seasonal/Vacation/Temporary residence	4.62	1
	Other	4.63	2
	No eligible respondent by age	4.71	728
	No eligible respondent by race	4.72	1259
	Quota filled	4.80	321
Total Cases Fielded			3565

Detailed Breakdown: SAQ Survey

All Milwaukee Oversample Cases (CAPI Respondents)

SAQ Disposition Code	SAQ Disposition Description	SAQ Survey Overall (N=592)
1	Completed SAQ	398
23	Refusal	7
3	Deceased	0
31	No Good Address	14
32	No Response	173
	CASRO Response Rate	67.22%

Detailed Breakdown: Cognitive Telephone Interview Survey

All Milwaukee Oversample Cases (CAPI Respondents)

Cognitive Disposition Code(s)	Cognitive Disposition Description	Cognitive Survey Overall (N=592)
1	Completed Interview	307
22 - 26	Refused	37
3	Deceased	2
4 -5	Partial Interview	5
29 - 36	Unable to Interview	222
60 - 63	Unable to Contact	19
	CASRO Response Rate	51.85%

MIDUS Milwaukee Cognitive Survey		
	All Cases Fielded	Overall Sample (N=592)
1	Complete	307
	COMPLETE	307
3	Deceased	2
	R DECEASED	2
4	Partial interview, unable to contact	2
5	Partial interview, R refused to finish	3
	PARTIAL INTERVIEW	5
22	Refused - By I for R	4
23	Refused - by R	10
25	2nd Refusal - By I for R	0
26	2nd Refusal - by R	23
	REFUSED - HH CONFIRMED	37
29	Claims no such person	11
30	Inaccessible R confirmed	206
36	R incapacitated	5
	UNABLE TO INTERVIEW	222
60	Ring, no answer	9
63	Answering Machine or Voice	10
	UNABLE TO CONTACT	19
	Total Fielded Numbers	592
	COMPLETES	307
	REFUSALS	37
	Unable	222
	CASRO RESPONSE RATE	.5185

Appendix B
MILWAUKEE AFRICAN-AMERICAN OVERSAMPLE
Field Report

Screening Matrices
All 8 Forms

MIDUS Milwaukee CAPI Study

University of Wisconsin Survey Center
FORM 1_4

UWSC Project 9420
CASE ID _____
DATE: ____/____/____
INTERVIEWER ID: _____
INCENTIVE #: _____
BLOCK # _____ TRACK # _____

S1. Hello, I'm _____ from the University of Wisconsin Survey Center. I'm working on an important study of the lives of American adults – their health, working conditions, and life outlooks and concerns. We are interviewing individuals throughout the United States. And your household has been randomly selected to take part in the project. The interview will take about two hours to complete and if a member of your household is selected, they will receive \$50 cash as a “thank you” for their time.

S2a. How many members of your household are between the ages of 35 – 84 years old? _____

IF S2a equals <0> go to S9, otherwise go to TABLE 1

TABLE 1

And, how many of those (people in your household) are White or Caucasian? _____

How many of those are Hispanic? _____

And, how many of those are Black or African American? _____

How many of those are Asian? _____

And, how many of those are Native American? _____

In order to determine who to conduct the interview with, I need to know the age and gender of each *Black or African American* person between 35 - 84 years old in your household, starting with the oldest person.



HH	35 - 84 AGE GROUP	
	AGE	GENDER
1		M F
2		M F
3		M F
4		M F
5		M F
6		M F
7		M F
8		M F

S3. **INTERVIEWER:** IF MORE THAN ONE PERSON IS ELIGIBLE, CONSULT THE FOLLOWING SELECTION TABLE TO DETERMINE THE PERSON TO BE INTERVIEWED.

Number of WOMEN in HH	Number of Persons in HH			
	1	2	3	4+
0	Man	Oldest Man	Youngest Man	Youngest Man
1	Woman	Woman	Woman	Oldest Man
2		Oldest Woman	Youngest Woman	Youngest Woman
3			Youngest Woman	Oldest Woman
4+				Oldest Woman

S4. INTERVIEWER: ARE YOU SPEAKING WITH THE SELECTED RESPONDENT?

Yes..... 1

No..... 2 → (SKIP TO S.6)

S5. As I said, I would like to interview you for our study on health and mid-life. Can we find a reasonably private spot to complete the interview?

Respondent agrees to begin interview1 → (START LAPTOP)

Respondent agrees to be interviewed, but at another time.....2 → (SKIP TO S.8)

Respondent refuses to interview at any time9 → (CONVERSION)

S6. May I speak with (DESCRIPTION OF "R" FROM S.3)

Yes..... 1

No (not available)..... 2 → (SKIP TO S.8)

S7. Hello, I'm _____from the University of Wisconsin Survey Center. I'm working on an important study of the lives of American adults. Your household has been randomly selected to take part in the project. It will take about two hours to complete the questionnaire, and at the end of the interview, you will receive \$50 cash as a "thank you" for your time.

Can we find a reasonably private spot to complete the interview?

Respondent agrees to begin interview 1 → (START LAPTOP)

Respondent agrees to be interviewed, but at another time..... 2 → (SKIP TO S.8)

Respondent refuses to be interviewed at any time..... 9 → (CONVERSION)

S8. TRY TO MAKE A HARD APPOINTMENT. IF NOT POSSIBLE, MAKE A SOFT APPOINTMENT.

Respondent is scheduled for:

DAY/BEST DAY(S): _____

TIME/BEST TIMES(S): _____

FIRST NAME (optional) _____

PHONE NUMBER (optional) _____

S9. Thank you for your time. No one in your household is eligible for this study. Good day / Good evening!

CONVERSION:

Cash incentive

Interview can be done at respondent's convenience

Interview can be done in parts

Interview can be done elsewhere – car, coffeeshop, library

Interview can be done by a different interviewer

MIDUS Milwaukee CAPI Study

University of Wisconsin Survey Center
FORM 2_4

UWSC Project 9420
CASE ID _____
DATE: ____/____/____
INTERVIEWER ID: _____
INCENTIVE #: _____
BLOCK # _____ TRACT # _____

S1. Hello, I'm _____ from the University of Wisconsin Survey Center. I'm working on an important study of the lives of American adults – their health, working conditions, and life outlooks and concerns. We are interviewing individuals throughout the United States. And your household has been randomly selected to take part in the project. The interview will take about two hours to complete and if a member of your household is selected, they will receive \$50 cash as a "thank you" for their time.

S2a. How many members of your household are between the ages of 35 – 84 years old? _____

IF S2a equals <0> go to S9, otherwise go to TABLE 1

TABLE 1

And, how many of those (people in your household) are White or Caucasian? _____

How many of those are Hispanic? _____

And, how many of those are Black or African American? _____

How many of those are Asian? _____

And, how many of those are Native American? _____

In order to determine who to conduct the interview with, I need to know the age and gender of each *Black or African American* person between 35 - 84 years old in your household, starting with the oldest person.



HH	35 - 84 AGE GROUP	
	AGE	GENDER
1		M F
2		M F
3		M F
4		M F
5		M F
6		M F
7		M F
8		M F

S3. **INTERVIEWER:** IF MORE THAN ONE PERSON IS ELIGIBLE, CONSULT THE FOLLOWING SELECTION TABLE TO DETERMINE THE PERSON TO BE INTERVIEWED.

Number of WOMEN in HH	Number of Persons in HH			
	1	2	3	4+
0	Man	Youngest Man	Youngest Man	Oldest Man
1	Woman	Woman	Oldest Man	Woman
2		Oldest Woman	Man	Oldest Man
3			Youngest Woman	Man or Oldest Man
4+ ↓				Oldest Woman

S4. INTERVIEWER: ARE YOU SPEAKING WITH THE SELECTED RESPONDENT?

Yes..... 1

No..... 2 → (SKIP TO S.6)

S5. As I said, I would like to interview you for our study on health and mid-life. Can we find a reasonably private spot to complete the interview?

Respondent agrees to begin interview1 → (START LAPTOP)

Respondent agrees to be interviewed, but at another time.....2 → (SKIP TO S.8)

Respondent refuses to interview at any time9 → (CONVERSION)

S6. May I speak with (DESCRIPTION OF "R" FROM S.3)

Yes..... 1

No (not available)..... 2 → (SKIP TO S.8)

S7. Hello, I'm _____from the University of Wisconsin Survey Center. I'm working on an important study of the lives of American adults. Your household has been randomly selected to take part in the project. It will take about two hours to complete the questionnaire, and at the end of the interview, you will receive \$50 cash as a "thank you" for your time.

Can we find a reasonably private spot to complete the interview?

Respondent agrees to begin interview 1 → (START LAPTOP)

Respondent agrees to be interviewed, but at another time..... 2 → (SKIP TO S.8)

Respondent refuses to be interviewed at any time..... 9 → (CONVERSION)

S8. TRY TO MAKE A HARD APPOINTMENT. IF NOT POSSIBLE, MAKE A SOFT APPOINTMENT.

Respondent is scheduled for:

DAY/BEST DAY(S): _____

TIME/BEST TIMES(S): _____

FIRST NAME (optional) _____

PHONE NUMBER (optional) _____

S9. Thank you for your time. No one in your household is eligible for this study. Good day / Good evening!

CONVERSION:

Cash incentive

Interview can be done at respondent's convenience

Interview can be done in parts

Interview can be done elsewhere – car, coffeeshop, library

Interview can be done by a different interviewer

MIDUS Milwaukee CAPI Study

University of Wisconsin Survey Center
FORM 3_4

UWSC Project 9420
CASE ID _____
DATE: ____/____/____
INTERVIEWER ID: _____
INCENTIVE #: _____
BLOCK # _____ TRACT # _____

S1. Hello, I'm _____ from the University of Wisconsin Survey Center. I'm working on an important study of the lives of American adults – their health, working conditions, and life outlooks and concerns. We are interviewing individuals throughout the United States. And your household has been randomly selected to take part in the project. The interview will take about two hours to complete and if a member of your household is selected, they will receive \$50 cash as a "thank you" for their time.

S2a. How many members of your household are between the ages of 35 – 84 years old? _____

IF S2a equals <0> go to S9, otherwise go to TABLE 1

TABLE 1

And, how many of those (people in your household) are White or Caucasian? _____

How many of those are Hispanic? _____

And, how many of those are Black or African American? _____

How many of those are Asian? _____

And, how many of those are Native American? _____

In order to determine who to conduct the interview with, I need to know the age and gender of each *Black or African American* person between 35 - 84 years old in your household, starting with the oldest person.



HH	35 - 84 AGE GROUP	
	AGE	GENDER
1		M F
2		M F
3		M F
4		M F
5		M F
6		M F
7		M F
8		M F

S3. **INTERVIEWER:** IF MORE THAN ONE PERSON IS ELIGIBLE, CONSULT THE FOLLOWING SELECTION TABLE TO DETERMINE THE PERSON TO BE INTERVIEWED.

Number of WOMEN in HH	Number of Persons in HH			
	1	2	3	4+
0	Man	Youngest Man	Oldest Man	Oldest Man
1	Woman	Man	Woman	Youngest Man
2		Youngest Woman	Oldest Woman	Oldest Woman
3			Oldest Woman	Youngest woman
4+				Youngest Woman

S4. INTERVIEWER: ARE YOU SPEAKING WITH THE SELECTED RESPONDENT?

Yes..... 1

No..... 2 → (SKIP TO S.6)

S5. As I said, I would like to interview you for our study on health and mid-life. Can we find a reasonably private spot to complete the interview?

Respondent agrees to begin interview1 → (START LAPTOP)

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S6. May I speak with (DESCRIPTION OF "R" FROM S.3)

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No (not available)..... 2 → (SKIP TO S.8)

S7. Hello, I'm _____from the University of Wisconsin Survey Center. I'm working on an important study of the lives of American adults. Your household has been randomly selected to take part in the project. It will take about two hours to complete the questionnaire, and at the end of the interview, you will receive \$50 cash as a "thank you" for your time.

Can we find a reasonably private spot to complete the interview?

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Respondent refuses to be interviewed at any time..... 9 → (CONVERSION)

S8. TRY TO MAKE A HARD APPOINTMENT. IF NOT POSSIBLE, MAKE A SOFT APPOINTMENT.

Respondent is scheduled for:

DAY/BEST DAY(S): _____

TIME/BEST TIMES(S): _____

FIRST NAME (optional) _____

PHONE NUMBER (optional) _____

S9. Thank you for your time. No one in your household is eligible for this study. Good day / Good evening!

CONVERSION:

Cash incentive

Interview can be done at respondent's convenience

Interview can be done in parts

Interview can be done elsewhere – car, coffeeshop, library

Interview can be done by a different interviewer

MIDUS Milwaukee CAPI Study

University of Wisconsin Survey Center
FORM 4_4

UWSC Project 9420
CASE ID _____
DATE: ____/____/____
INTERVIEWER ID: _____
INCENTIVE #: _____
BLOCK # _____ TRACT # _____

S1. Hello, I'm _____ from the University of Wisconsin Survey Center. I'm working on an important study of the lives of American adults – their health, working conditions, and life outlooks and concerns. We are interviewing individuals throughout the United States. And your household has been randomly selected to take part in the project. The interview will take about two hours to complete and if a member of your household is selected, they will receive \$50 cash as a "thank you" for their time.

S2a. How many members of your household are between the ages of 35 – 84 years old? _____

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TABLE 1

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	AGE	GENDER
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6		M F
7		M F
8		M F

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0	Man	Oldest Man	Oldest Man	Youngest Man
1	Woman	Man	Youngest Man	Woman
2		Youngest Woman	Man	Youngest Man
3			Oldest Woman	Man or youngest Man
4+				Youngest Woman

S4. INTERVIEWER: ARE YOU SPEAKING WITH THE SELECTED RESPONDENT?

Yes..... 1

No..... 2 → (SKIP TO S.6)

S5. As I said, I would like to interview you for our study on health and mid-life. Can we find a reasonably private spot to complete the interview?

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Respondent is scheduled for:

DAY/BEST DAY(S): _____

TIME/BEST TIMES(S): _____

FIRST NAME (optional) _____

PHONE NUMBER (optional) _____

S9. Thank you for your time. No one in your household is eligible for this study. Good day / Good evening!

CONVERSION:

Cash incentive

Interview can be done at respondent's convenience

Interview can be done in parts

Interview can be done elsewhere – car, coffeeshop, library

Interview can be done by a different interviewer

MIDUS Milwaukee CAPI Study

University of Wisconsin Survey Center
FORM 1_4_2nd

UWSC Project 9420
CASE ID _____
DATE: ____/____/____
INTERVIEWER ID: _____
INCENTIVE #: _____
BLOCK # _____ TRACK # _____

S1. Hello, I'm _____ from the University of Wisconsin Survey Center. I'm working on an important study of the lives of American adults – their health, working conditions, and life outlooks and concerns. We are interviewing individuals throughout the United States. And your household has been randomly selected to take part in the project. The interview will take about two hours to complete and if a member of your household is selected, they will receive \$50 cash as a “thank you” for their time.

S2a. How many members of your household are between the ages of 35 – 84 years old? _____

IF S2a equals <0> go to S9, otherwise go to TABLE 1

TABLE 1

And, how many of those (people in your household) are White or Caucasian? _____

How many of those are Hispanic? _____

And, how many of those are Black or African American? _____

How many of those are Asian? _____

And, how many of those are Native American? _____

In order to determine who to conduct the interview with, I need to know the age and gender of each *Black or African American* person between 35 - 84 years old in your household, starting with the oldest person.



HH	35 - 84 AGE GROUP	
	AGE	GENDER
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2		M F
3		M F
4		M F
5		M F
6		M F
7		M F
8		M F

S3. **INTERVIEWER:** IF MORE THAN ONE PERSON IS ELIGIBLE, CONSULT THE FOLLOWING SELECTION TABLE TO DETERMINE THE PERSON TO BE INTERVIEWED.

Number of WOMEN in HH	Number of Persons in HH			
	1	2	3	4+
0	Man	Youngest Man	Youngest Man	Youngest Man
1	Woman	Woman	Woman	Woman
2		Youngest Woman	Youngest Woman	Youngest Woman
3			Youngest Woman	Youngest Woman
4+				Youngest Woman

S4. INTERVIEWER: ARE YOU SPEAKING WITH THE SELECTED RESPONDENT?

Yes..... 1

No..... 2 → (SKIP TO S.6)

S5. As I said, I would like to interview you for our study on health and mid-life. Can we find a reasonably private spot to complete the interview?

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S7. Hello, I'm _____from the University of Wisconsin Survey Center. I'm working on an important study of the lives of American adults. Your household has been randomly selected to take part in the project. It will take about two hours to complete the questionnaire, and at the end of the interview, you will receive \$50 cash as a "thank you" for your time.

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S8. TRY TO MAKE A HARD APPOINTMENT. IF NOT POSSIBLE, MAKE A SOFT APPOINTMENT.

Respondent is scheduled for:

DAY/BEST DAY(S): _____

TIME/BEST TIMES(S): _____

FIRST NAME (optional) _____

PHONE NUMBER (optional) _____

S9. Thank you for your time. No one in your household is eligible for this study. Good day / Good evening!

CONVERSION:

Cash incentive

Interview can be done at respondent's convenience

Interview can be done in parts

Interview can be done elsewhere – car, coffeeshop, library

Interview can be done by a different interviewer

MIDUS Milwaukee CAPI Study

University of Wisconsin Survey Center
FORM 2_4_2nd

UWSC Project 9420
CASE ID _____
DATE: ____/____/____
INTERVIEWER ID: _____
INCENTIVE #: _____
BLOCK # _____ TRACT # _____

S1. Hello, I'm _____ from the University of Wisconsin Survey Center. I'm working on an important study of the lives of American adults – their health, working conditions, and life outlooks and concerns. We are interviewing individuals throughout the United States. And your household has been randomly selected to take part in the project. The interview will take about two hours to complete and if a member of your household is selected, they will receive \$50 cash as a "thank you" for their time.

S2a. How many members of your household are between the ages of 35 – 84 years old? _____

IF S2a equals <0> go to S9, otherwise go to TABLE 1

TABLE 1

And, how many of those (people in your household) are White or Caucasian? _____

How many of those are Hispanic? _____

And, how many of those are Black or African American? _____

How many of those are Asian? _____

And, how many of those are Native American? _____

In order to determine who to conduct the interview with, I need to know the age and gender of each *Black or African American* person between 35 - 84 years old in your household, starting with the oldest person.



HH	35 - 84 AGE GROUP	
	AGE	GENDER
1		M F
2		M F
3		M F
4		M F
5		M F
6		M F
7		M F
8		M F

S3. **INTERVIEWER:** IF MORE THAN ONE PERSON IS ELIGIBLE, CONSULT THE FOLLOWING SELECTION TABLE TO DETERMINE THE PERSON TO BE INTERVIEWED.

Number of WOMEN in HH	Number of Persons in HH			
	1	2	3	4+
0	Man	Oldest Man	Oldest Man	Oldest Man
1	Woman	Woman	Youngest Man	Youngest Man
2		Oldest Woman	Man	Youngest Man
3			Oldest Woman	Man or Oldest Man
4+				Oldest Woman



S4. INTERVIEWER: ARE YOU SPEAKING WITH THE SELECTED RESPONDENT?

Yes..... 1

No..... 2 → (SKIP TO S.6)

S5. As I said, I would like to interview you for our study on health and mid-life. Can we find a reasonably private spot to complete the interview?

Respondent agrees to begin interview1 → (START LAPTOP)

Respondent agrees to be interviewed, but at another time.....2 → (SKIP TO S.8)

Respondent refuses to interview at any time9 → (CONVERSION)

S6. May I speak with (DESCRIPTION OF "R" FROM S.3)

Yes..... 1

No (not available)..... 2 → (SKIP TO S.8)

S7. Hello, I'm _____from the University of Wisconsin Survey Center. I'm working on an important study of the lives of American adults. Your household has been randomly selected to take part in the project. It will take about two hours to complete the questionnaire, and at the end of the interview, you will receive \$50 cash as a "thank you" for your time.

Can we find a reasonably private spot to complete the interview?

Respondent agrees to begin interview 1 → (START LAPTOP)

Respondent agrees to be interviewed, but at another time..... 2 → (SKIP TO S.8)

Respondent refuses to be interviewed at any time..... 9 → (CONVERSION)

S8. TRY TO MAKE A HARD APPOINTMENT. IF NOT POSSIBLE, MAKE A SOFT APPOINTMENT.

Respondent is scheduled for:

DAY/BEST DAY(S): _____

TIME/BEST TIMES(S): _____

FIRST NAME (optional) _____

PHONE NUMBER (optional) _____

S9. Thank you for your time. No one in your household is eligible for this study. Good day / Good evening!

CONVERSION:

Cash incentive

Interview can be done at respondent's convenience

Interview can be done in parts

Interview can be done elsewhere – car, coffeeshop, library

Interview can be done by a different interviewer

MIDUS Milwaukee CAPI Study

University of Wisconsin Survey Center
FORM 3_4_2nd

UWSC Project 9420
CASE ID _____
DATE: ____/____/____
INTERVIEWER ID: _____
INCENTIVE #: _____
BLOCK # _____ TRACT # _____

S1. Hello, I'm _____ from the University of Wisconsin Survey Center. I'm working on an important study of the lives of American adults – their health, working conditions, and life outlooks and concerns. We are interviewing individuals throughout the United States. And your household has been randomly selected to take part in the project. The interview will take about two hours to complete and if a member of your household is selected, they will receive \$50 cash as a "thank you" for their time.

S2a. How many members of your household are between the ages of 35 – 84 years old? _____

IF S2a equals <0> go to S9, otherwise go to TABLE 1

TABLE 1

And, how many of those (people in your household) are White or Caucasian? _____

How many of those are Hispanic? _____

And, how many of those are Black or African American? _____

How many of those are Asian? _____

And, how many of those are Native American? _____

In order to determine who to conduct the interview with, I need to know the age and gender of each *Black or African American* person between 35 - 84 years old in your household, starting with the oldest person.



HH	35 - 84 AGE GROUP	
	AGE	GENDER
1		M F
2		M F
3		M F
4		M F
5		M F
6		M F
7		M F
8		M F

S3. **INTERVIEWER:** IF MORE THAN ONE PERSON IS ELIGIBLE, CONSULT THE FOLLOWING SELECTION TABLE TO DETERMINE THE PERSON TO BE INTERVIEWED.

Number of WOMEN in HH	Number of Persons in HH			
	1	2	3	4+
0	Man	Oldest Man	Oldest Man	Oldest Man
1	Woman	Man	Oldest Man	Oldest Man
2		Oldest Woman	Oldest Woman	Oldest Woman
3			Oldest Woman	Oldest Woman
4+				Oldest Woman



S4. INTERVIEWER: ARE YOU SPEAKING WITH THE SELECTED RESPONDENT?

Yes..... 1

No..... 2 → (SKIP TO S.6)

S5. As I said, I would like to interview you for our study on health and mid-life. Can we find a reasonably private spot to complete the interview?

Respondent agrees to begin interview1 → (START LAPTOP)

Respondent agrees to be interviewed, but at another time.....2 → (SKIP TO S.8)

Respondent refuses to interview at any time9 → (CONVERSION)

S6. May I speak with (DESCRIPTION OF "R" FROM S.3)

Yes..... 1

No (not available)..... 2 → (SKIP TO S.8)

S7. Hello, I'm _____from the University of Wisconsin Survey Center. I'm working on an important study of the lives of American adults. Your household has been randomly selected to take part in the project. It will take about two hours to complete the questionnaire, and at the end of the interview, you will receive \$50 cash as a "thank you" for your time.

Can we find a reasonably private spot to complete the interview?

Respondent agrees to begin interview 1 → (START LAPTOP)

Respondent agrees to be interviewed, but at another time..... 2 → (SKIP TO S.8)

Respondent refuses to be interviewed at any time..... 9 → (CONVERSION)

S8. TRY TO MAKE A HARD APPOINTMENT. IF NOT POSSIBLE, MAKE A SOFT APPOINTMENT.

Respondent is scheduled for:

DAY/BEST DAY(S): _____

TIME/BEST TIMES(S): _____

FIRST NAME (optional) _____

PHONE NUMBER (optional) _____

S9. Thank you for your time. No one in your household is eligible for this study. Good day / Good evening!

CONVERSION:

Cash incentive

Interview can be done at respondent's convenience

Interview can be done in parts

Interview can be done elsewhere – car, coffeeshop, library

Interview can be done by a different interviewer

MIDUS Milwaukee CAPI Study

University of Wisconsin Survey Center
FORM 4_4_2nd

UWSC Project 9420
CASE ID _____
DATE: ____/____/____
INTERVIEWER ID: _____
INCENTIVE #: _____
BLOCK # _____ TRACT # _____

S1. Hello, I'm _____ from the University of Wisconsin Survey Center. I'm working on an important study of the lives of American adults – their health, working conditions, and life outlooks and concerns. We are interviewing individuals throughout the United States. And your household has been randomly selected to take part in the project. The interview will take about two hours to complete and if a member of your household is selected, they will receive \$50 cash as a "thank you" for their time.

S2a. How many members of your household are between the ages of 35 – 84 years old? _____

IF S2a equals <0> go to S9, otherwise go to TABLE 1

TABLE 1

And, how many of those (people in your household) are White or Caucasian? _____

How many of those are Hispanic? _____

And, how many of those are Black or African American? _____

How many of those are Asian? _____

And, how many of those are Native American? _____

In order to determine who to conduct the interview with, I need to know the age and gender of each *Black or African American* person between 35 - 84 years old in your household, starting with the oldest person.



HH	35 - 84 AGE GROUP	
	AGE	GENDER
1		M F
2		M F
3		M F
4		M F
5		M F
6		M F
7		M F
8		M F

S3. **INTERVIEWER:** IF MORE THAN ONE PERSON IS ELIGIBLE, CONSULT THE FOLLOWING SELECTION TABLE TO DETERMINE THE PERSON TO BE INTERVIEWED.

Number of WOMEN in HH	Number of Persons in HH			
	1	2	3	4+
0	Man	Oldest Man	Oldest Man	Oldest Man
1	Woman	Man	Oldest Man	Oldest Man
2		Oldest Woman	Man	Oldest Man
3			Oldest Woman	Man or Oldest Man
4+				Woman



S4. INTERVIEWER: ARE YOU SPEAKING WITH THE SELECTED RESPONDENT?

Yes..... 1

No..... 2 → (SKIP TO S.6)

S5. As I said, I would like to interview you for our study on health and mid-life. Can we find a reasonably private spot to complete the interview?

Respondent agrees to begin interview1 → (START LAPTOP)

Respondent agrees to be interviewed, but at another time.....2 → (SKIP TO S.8)

Respondent refuses to interview at any time9 → (CONVERSION)

S6. May I speak with (DESCRIPTION OF "R" FROM S.3)

Yes..... 1

No (not available)..... 2 → (SKIP TO S.8)

S7. Hello, I'm _____from the University of Wisconsin Survey Center. I'm working on an important study of the lives of American adults. Your household has been randomly selected to take part in the project. It will take about two hours to complete the questionnaire, and at the end of the interview, you will receive \$50 cash as a "thank you" for your time.

Can we find a reasonably private spot to complete the interview?

Respondent agrees to begin interview 1 → (START LAPTOP)

Respondent agrees to be interviewed, but at another time..... 2 → (SKIP TO S.8)

Respondent refuses to be interviewed at any time..... 9 → (CONVERSION)

S8. TRY TO MAKE A HARD APPOINTMENT. IF NOT POSSIBLE, MAKE A SOFT APPOINTMENT.

Respondent is scheduled for:

DAY/BEST DAY(S): _____

TIME/BEST TIMES(S): _____

FIRST NAME (optional) _____

PHONE NUMBER (optional) _____

S9. Thank you for your time. No one in your household is eligible for this study. Good day / Good evening!

CONVERSION:

Cash incentive

Interview can be done at respondent's convenience

Interview can be done in parts

Interview can be done elsewhere – car, coffeeshop, library

Interview can be done by a different interviewer

Appendix C
MILWAUKEE AFRICAN-AMERICAN OVERSAMPLE
Field Report

Letters and Materials

Frequently Asked Questions about the MIDUS Study

- **Why should I participate in MIDUS?**

As a resident of the Milwaukee area, your participation is very important to the MIDUS survey. Understanding the lives of those in your community is crucial to the success of the study.

Researchers on the MIDUS project will use the information from this study to help inform policy decisions made by our lawmakers and government agencies, as the U.S. population in this age group continues to expand over the next 20 years. Participating in the MIDUS project is your chance to have input into these decisions.

- **Who can participate in MIDUS?**

Only members of a small number of carefully selected households can participate. The University of Wisconsin Survey Center interviewer will determine if anyone in your household is eligible. Only one member of your household may be selected to participate. *We cannot replace your household in our sample. This is why it is so important that we speak with you.*

- **Will I be paid to participate in MIDUS?**

Yes, you will. After completing the in-person interview you will receive **\$50** to show our appreciation.

When you complete and return the mail survey, you will receive another **\$20**, so you will receive a total of **\$70** for participating in MIDUS.

- **What is involved in participating in MIDUS?**

MIDUS consists of an initial survey which will be conducted by an interviewer, in-person. This interview will be about two hours long and include questions about your health, work and family life. The interview can be done at a time convenient for you and, if you wish, can be completed in more than one visit.

When the in-person interview is complete, the interviewer will give you a mail survey to fill out and return in the postage-paid envelope provided.

After returning your completed mail questionnaire, you may be called again for a brief telephone interview involving some mental exercises about remembering and responding to words and numbers.

- **Can more than one person in my household participate?**

Only one adult between the ages of 35 to 84 years old from each household can participate. If there is more than one adult willing to participate, one member of the household will be randomly selected to be a MIDUS participant.

- **Who can I contact if I have questions about MIDUS?**

If you have any questions about the study, you can call the MIDUS toll free number at 1-866-271-2378 ext. 9420. We would be happy to talk to you about any questions you may have.

Summer 2005

«Address»
«City», «State» «Zip_Code»

Dear Current Resident(s),

I would like to invite you or someone in your household to participate in an important study being conducted by the National Institute on Aging with researchers at universities from around the United States. This study is called the Midlife in the United States Study of Health and Well-being, or MIDUS, and is designed to help us learn more about the lives of American adults—their health, working conditions, personal and family relationships, life outlooks and concerns, and many other aspects of adult life.

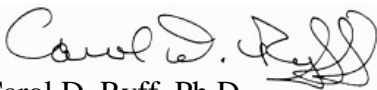
One adult in your household, between the ages of 35 and 84 is invited to participate. **Eligible participants will be offered up to \$70 to complete all of the various parts of the study**, and may also have the opportunity to participate in further research by the National Institute on Aging. Over 7,000 adults nationwide have already participated in this important study. Residents of the Milwaukee area are the current focus of our ongoing research. Your participation is crucial to the success of this survey.

In the next few weeks, an interviewer from the University of Wisconsin Survey Center will visit your home to determine if someone from your household is eligible to participate, and conduct an interview with that person. Participation is voluntary. The information provided will only be used for statistical analysis and will not be disclosed to any other persons or organizations in a manner that would allow you to be identified. The interview can be done at a time convenient for you and, if you wish, can be completed in more than one visit.

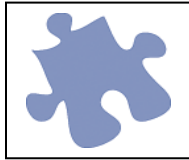
After completing the in-person interview, the participant will be given a questionnaire to fill out and return in the mail. Participation in this part of the study is very important. Finally, you may be called again for a brief telephone interview involving some mental exercises about remembering and responding to words and numbers. As always, your participation is completely voluntary and any information you share with us will be kept strictly confidential.

We look forward to talking with you! For further details about the MIDUS survey, please see the list of frequently asked questions on the back of this letter. We encourage you to share this letter with others in your household who may be interested in participating.

Sincerely,



Carol D. Ryff, Ph.D.
Principal Investigator, MIDUS
Director, Institute on Aging «UWSC_Case_ID»



P9420: MIDUS MILWAUKEE STUDY
CAPI

UNIVERSITY OF WISCONSIN SURVEY CENTER
(866) 271-2378

Case ID : «UWSC_Case_ID»

BTCB :

Release Date: «Release_Date»

Sample Type: «Sample_Type»

Tract: «tract»

Block: «block»

Listing Notes: «Listing_Notes»

Listing Status: «Listing_Status»

«Address»

«City», «State» «Zip_Code»

INFORMANT INFORMATION

INFORMANT INFORMATION						
Informant 1: DATE RECEIVED _____		Informant 2: DATE RECEIVED _____		Informant 3: DATE RECEIVED _____		
Interviewer INITIALS _____		Interviewer INITIALS _____		Interviewer INITIALS _____		
Informant Name:		Informant Name:		Informant Name:		
Notes:		Notes:		Notes:		
Visit/Call	Date	Time	Call Results	Code	Interviewer Initials	Re-visit Day / Time

Instructions for Respondent

GUIDE TO THE MIDUS MILWAUKEE MAIL SURVEY

Thank you for your participation in the *Midlife in the United States National Study of Health and Well-being*, a study designed to help us learn more about how adults in the U.S. are coping with the challenges of adult life and aging and the factors that contribute to a healthy adult life. This study is being conducted by the National Institute on Aging and the University of Wisconsin-Madison.

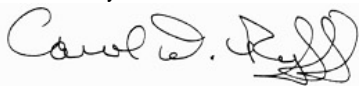
Enclosed is a booklet that makes up the mail survey portion of the study. You will receive a check for \$20.00 after completing and returning this booklet.

Also enclosed is a postage-paid business-reply envelope that you should use to return the booklet to us. You can drop the survey, enclosed in this postage-paid envelope, into any outgoing mail box or have your regular postal worker take it with your other outgoing mail.

When you open the booklet, you will see that there are directions on how to complete the survey questions. Take your time and answer the questions as completely as possible. You do not have to fill out the survey all at one time. Feel free to take a break and come back to it later. We do ask that you fill out the survey and return it within the next few days, if possible.

If you have any questions about how to fill out the questionnaire, please call us toll-free at 1-866-271-2378 ext. 9420. Thank you again.

Sincerely,

A handwritten signature in black ink that reads "Carol D. Ryff". The signature is written in a cursive style with a large, stylized "R" and "ff" at the end.

Carol D. Ryff, PhD
Principal Investigator of the
Midlife in the United States
National Study of Health and Well-being

August 29, 2005

«Address»

«CITY», «STATE» «Zip_Code»

MIDUS NEEDS YOUR HELP!

Dear Milwaukee Participant,

We recently visited you to ask for your help with a study about American adult life that we are conducting at the University of Wisconsin for the **MIDUS (Midlife in the U.S. National Survey of Health and Well-being)** project. At the time we visited, we were not able to interview you about your experiences. We hope that if you know more about the work we do and the importance of this study to the African American community, you might reconsider and agree to participate.

While over 7,000 adults nationwide have already participated, residents of the Milwaukee area are the current focus of our ongoing research. As a token of our appreciation, eligible participants will be given \$70 for completing the various parts of the study, and also may have the opportunity to participate in further research.

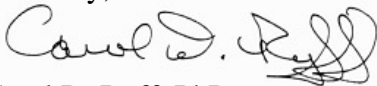
This project is a scientific study funded by the National Institute on Aging and is one of the largest studies of American life of its kind. It is unique because it is one of the few studies that looks at the lives of American adults—their health, working conditions, personal and family relationships, life outlooks and concerns, and many other aspects of adult life and how all of these factors affect health and well-being at midlife and beyond.

We have enclosed a National Urban League article written by Dr. David Williams, a principal investigator on this study. His research about racial disparities in health is just one of the many publications that draw from data collected by the MIDUS.

Many people who have participated have told us that they find the interview interesting and enjoyable. The interview can be broken into parts if you would prefer not to do it all at one time. We would be happy to schedule an appointment for the interview at your convenience and in a place that is comfortable for you.

If you have any questions about participating in this study, please call the University of Wisconsin Survey Center toll-free at 1-866-271-2378 ext. 9420. One of our interviewers will be contacting you within the next few weeks. We hope that you will take this last opportunity to participate in this important project.

Sincerely,



Carol D. Ryff, PhD

Principal Investigator of the Midlife in the United States
National Study of Health and Well-being

«UWSC_Case_ID»

August 29, 2005

«Address»
«City», «STATE» «Zip_Code»

MIDUS NEEDS YOUR HELP!

Dear Milwaukee Participant,

We visited you recently to ask for your help with a study about American adult life that we are conducting at the University of Wisconsin for the *MIDUS (Midlife in the U.S. National Survey of Health and Well-being)* project. At the time we visited, we were not able to interview you about your experiences. We hope that if you know more about the work we do and the importance of this study to the African American community, you might reconsider and agree to participate.

While over 7,000 adults nationwide have already participated, residents of the Milwaukee area are the current focus of our ongoing research.

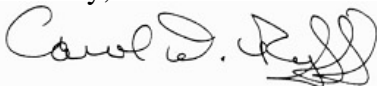
As a token of our appreciation, **eligible participants will be given \$70** for completing the various parts of the study, and also may have the opportunity to participate in further research. And we hope that you will enjoy the “stress” ball that we enclosed as something fun to remind you of the study.

Many people have told us that they find the interview interesting and enjoyable. It is very important that we speak to individuals and families with many different experiences and of many ages and backgrounds so that the results of this study will represent American adult life – including minorities.

The interview can be broken into parts if you would prefer not to do it all at one time. We would be happy to schedule an appointment for the interview at your convenience and in a place that is comfortable for you.

If you have any questions about participating in this study, please call the University of Wisconsin Survey Center toll-free at 1-866-271-2378 ext. 9420. One of our interviewers will be contacting you within the next few weeks. We hope that you will take this last opportunity to participate in this important project.

Sincerely,



Carol D. Ryff, PhD
Principal Investigator of the Midlife in the United States
National Study of Health and Well-being

«UWSC_Case_ID»

Persistently Unavailable Letter

August 29, 2005

«Address»
«CITY», «STATE» «Zip_Code»

MIDUS NEEDS YOUR HELP!

Dear Milwaukee Participant,

We have attempted to visit your residence to ask for your help with a study about American adult life that we are conducting at the University of Wisconsin for the *MIDUS (Midlife in the U.S. National Survey of Health and Well-being)* project.

At the times that we visited, we were not able to interview you about your experiences. The accuracy of the study depends upon conducting interviews in as many of the selected households as possible. An interviewer needs only a few minutes of your time to determine this eligibility.

While over 7,000 adults nationwide have already participated, residents of the Milwaukee area are the current focus of our ongoing research.

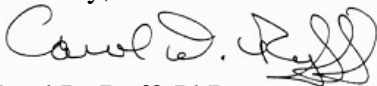
As a token of our appreciation, **eligible participants will be given \$70** for completing the various parts of the study, and also may have the opportunity to participate in further research. And we hope that you will enjoy the post-it notes that we enclosed as something useful to remind you of the study.

Many people have told us that they find the interview interesting and enjoyable. It is very important that we speak to individuals and families with many different experiences and of many ages and backgrounds so that the results of this study will represent American adult life – including minorities.

The interview can be broken into parts if you would prefer not to do it all at one time. We would be happy to schedule an appointment for the interview at your convenience and in a place that is comfortable for you.

If you have any questions about participating in this study, please call the University of Wisconsin Survey Center toll-free at 1-866-271-2378 ext. 9420. One of our interviewers will be contacting you within the next few weeks. We hope that you will take this last opportunity to participate in this important project.

Sincerely,



Carol D. Ryff, PhD
Principal Investigator of the Midlife in the United States
National Study of Health and Well-being

«UWSC_Case_ID»

MIDUS MILWAUKEE STUDY

P9420

Verification Interview Form

Completing Interviewer:

Case ID:

Date Interview Completed:

Verifier:

Date Verified:

Introduction: Hello, my name is _____. I am here on behalf of the University of Wisconsin Survey Center about the Mid-life in the US or MIDUS Study. Recently you might have been interviewed by a field interviewer for this study.

Do you recall being interviewed recently?

(If yes:) Do you remember the interviewer's name or what they looked like?
Were they a male or a female?

About how long did the interview take?

Was it a morning, afternoon, or evening interview?

Did the interviewer conduct the interview in person or over the telephone?

Were you given cash for your participation at the end of the interview?

How much cash were you given? Were the bills crisp and new?

Were there any problems or concerns that you had with the interview or interviewer?

Verification Interview Form

Was the interviewer courteous and respectful?

Did the interviewer speak clearly?

Did you have to repeat your answers frequently during the interview?

Did the interviewer have trouble hearing your answers?

(If yes), Did the interviewer have trouble hearing during the interview, or just before and after the interview – or both?

(If yes), Are you concerned that the interviewer might have entered your answers wrong in the computer? (Why?)

I need to confirm that the interviewer collected the right information – what is your date of birth?

Did the interviewer give you a mail survey to fill out and send in?

Is there anything else you would like to tell me about the interview?

Thank you very much for your time!

Verification Interview Form

If no (does not recall interview): Did anyone contact you to set up an appointment for an interview?

What happened after this person contacted you – why didn't the interview take place?

(Probe as necessary:) Did the interviewer show up for the scheduled appointment? Did you not show up for the scheduled appointment?

Thank you very much for your time!

*University of Wisconsin Survey Center
Kerryann DiLoreto – Project Director*

November 1, 2005

«R_First_Name» «R_Last_Name»
«Address»
«City», «State» «Zip_Code»

Dear Participant,

Thank you for your continued participation in the *Midlife in the United States National Study of Health and Well-being*, a survey designed to help us learn more about how adults in the U.S. are coping with the challenges of adult life and aging and the factors that contribute to a healthy adult life. This survey is being conducted by the National Institute on Aging and the University of Wisconsin-Madison. As we mentioned when we spoke to you in person recently, your participation is very important to the success of the survey.


Several weeks ago an interviewer gave you a mail survey. Our records show that we have not yet received your completed mail survey. If you have recently returned your survey, thank you! You should be receiving a check for \$20.00 in the next few days. If you have not completed and returned your survey, we would like to encourage you to do so at this time. Another questionnaire is included with this letter, in case you did not receive the original survey, or it has been misplaced.

Also enclosed is the postage-paid business reply envelope you should use to return the booklet to us. Once we receive your completed survey, we will send a check for \$20.00 as a token of our appreciation.

Take your time and answer the questions as completely as possible. You do not have to fill out the survey all at one time. Feel free to take a break and come back to it later. We do ask that you fill out the survey and return it within the next few days if possible.

If you have any questions about how to fill out the questionnaire, please call us toll-free at 1-866-271-2378, ext. 9420. Thank you again for continuing to participate.

Sincerely,



Carol D. Ryff, PhD
Principal Investigator of the
Midlife in the United States
National Study of Health and Well-being

«qryTotalUWSC_Case_ID»

October 18, 2005

«R_First_Name» «R_Last_Name»
«Address»
«City»«State»«Zip_Code»

Dear Participant,

We appreciate the time you spent participating in the in-person interview recently. The information you provided us at that time will be even more useful when combined with your answers to the questionnaire portion of the survey.

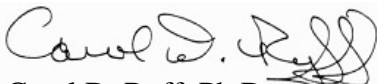
Nearly 4,000 MIDUS participants have completed and returned their questionnaires during the past year. We are writing now to let you know that it is not too late, and to request that you join them in filling out and returning the survey as soon as possible. We want to remind you that **upon receiving your completed questionnaire, we will be mailing you a check for \$20.**

To assist you in completing the survey, you will find a set of MIDUS Post-It Notes enclosed, which have our toll free phone number printed on them should you need to contact us with any questions you may have as you fill out the survey. Some participants have told us they have not returned the survey because they found some questions difficult to answer. If difficulty answering a few items has caused you not to send back your survey, we want to assure you that you may skip any questions you feel uncomfortable about, and encourage you to fill out as much of the survey as you can, and return it in the enclosed envelope. We have included a questionnaire in case you have misplaced the others given to you previously.

After looking over the questionnaire, if you would like personal assistance with filling it out, we would be happy to have an interviewer visit with you. Please let us know by calling the toll-free number.

We look forward to receiving your survey! As always, your participation is completely voluntary, and any information you share with us will be kept strictly confidential. **You may call us toll-free at 1-866-271-2378 with any changes or updated information about how to best reach you.** If you have any questions or concerns about the study, we hope you will call us and let us know. You may call Kerryann DiLoreto, at (608) 265-6598, at the University of Wisconsin Survey Center, or Barry Radler at the University of Wisconsin Institute on Aging at (608) 262-2056. We look forward to your continued participation.

Sincerely,



Carol D. Ryff, Ph.D.
Principal Investigator, MIDUS

«qryTotalUWSC_Case_ID»

Wave 3 Milwaukee Cover Letter
Director, Institute on Aging