

# 2014 SIPP - The New Phoenix



## Design, Contents, and Timeline

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March 6, 2014

Kick-off to the CNSTAT SIPP Evaluation Panel

Keck Center – National Academy of Science

# Outline

- Background and status
- Content and design – What's still here? – Dependent data...
- Demonstration of specific areas in the SIPP Instrument
- Innovation in processing
- Timeline for major milestones and data releases
- Evaluation – (Graton)

# Notes on the New Design

## Scope

- Similar to SIPP
- Broader than core / includes key topical module content in each wave

## Better integration of concepts

- EHC generates integrated reporting across domains
- Topics previously implemented as add-on modules now integrated
- Facilitate 'hooks' to enable supplements for additional content

Increased efficiency in processing and producing data products

Flexibility in administration (dynamic interview month and reference period)

Dependent data incorporation into EHC instrument

Reduced cost and burden through annual administration

Improve management through realigned structure and improved monitoring using all available tools – especially paradata

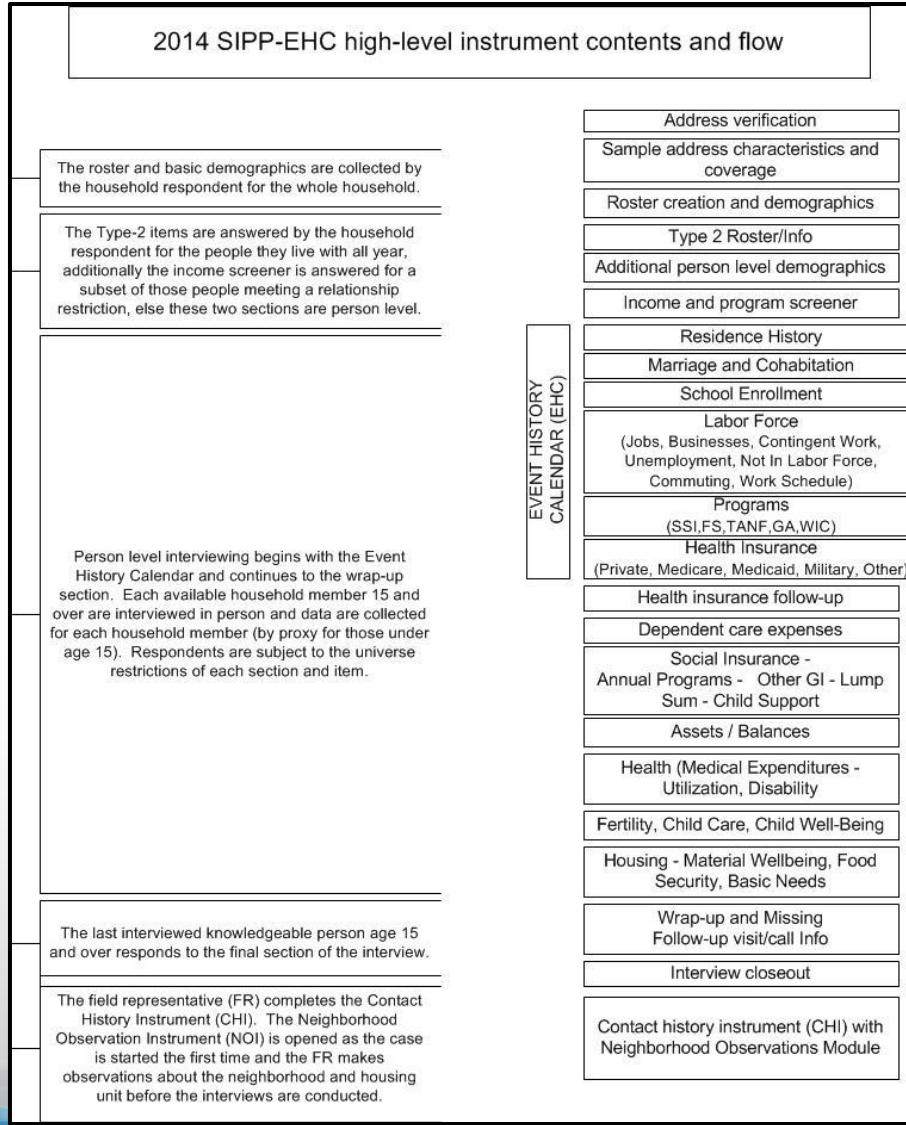
# SIPP Design Change - Example

Current SIPP - Calendar year 1												Calendar year 2						
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May		
Ref.	I-1																	
	Reference period – I-2		I-2															
(Rotation Group 1)				Reference period – I-3		I-3						Reference period – I-4		I-4				
Ref. pd. I-1	I-1																	
	Reference period – I-2		I-2															
(Rotation Group 2)				Reference period – I-3		I-3						Reference period – I-4		I-4				
Reference pd. – I-1	I-1																	
	Reference period – I-2		I-2															
(Rotation Group 3)				Reference period – I-3		I-3						Reference period – I-4		I-4				
Reference period – I-1	I-1																	
	Reference period – I-2		I-2															
(Rotation Group 4)				Reference period – I-3		I-3						Reference period – I-4		I-4				
Re-engineering - Calendar year 1												Calendar year 2						
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May		
Reference period												EHC Interview						

# Summary: Classic vs. New SIPP

	SIPP CLASSIC	NEW SIPP
<b>Instrument</b>	DOS-based	Blaise/C#
<b>Interview Frequency</b>	3x/year	Annual
<b>Interview Type</b>	Personal visit/telephone	Personal visit/telephone
<b>Reference Period</b>	Previous 4 months	Previous year
<b>Panel Length</b>	2.5-5 years	4 years (planned)
<b>Sample Size</b>	12-52,000 households (W1)	52,000 households (W1)
<b>Universe</b>	Civilian, non-institutional	Civilian, non-institutional
<b>Content</b>	Comprehensive	Comprehensive
<b>File Structure</b>	Complex	Simplified

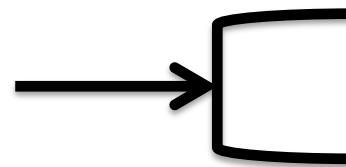
# SIPP-EHC 2014 Contents



# 2014 SIPP: Content Highlights

## Demographics:

- Roster: Interview-month household residents
- Roster of people you lived with during the year but who aren't in the interview month household (Type 2)
- Age, race, Hispanic origin, sex
- Relationship to householder, including options for same-sex partners and spouses
- Marital status, spouse pointer, year of marriage, times married, ever widowed, ever divorced, fertility screener

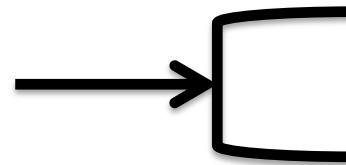


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# 2014 SIPP: Content Highlights

## Demographics:

- Gender neutral parent identification (Parent 1 and Parent 2)
- Type of parent for parent 1 and 2
- Nativity, citizenship, year moved to U.S., immigration status
- Education: Attainment, vocational/technical, professional certificates and licenses
- Armed forces service: Veteran status, period of service, active duty

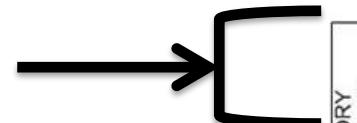


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# 2014 SIPP: Content Highlights

## Residency:

- Up to 5 residences during the calendar year for each person
- Tenure status of each residence
- Public housing status: Housing subsidy receipt, voucher receipt
- Reason for moving to address
- Left censor: Year and month moved into January address, tenure of prior residence

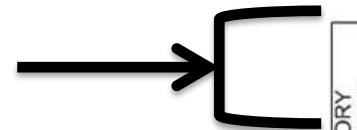


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# 2014 SIPP: Content Highlights

## Marital History:

- Up to 3 marital status spells
- Monthly marital status, with spouse pointer
- Monthly cohabitation status, with partner pointer
- Registered domestic partner item for cohabitations

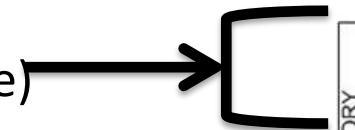


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# 2014 SIPP: Content Highlights

## Educational Enrollment:

- Up to 3 spells of educational enrollment
- Grade attended
- School type (public, private, charter, home)
- Enrollment type (full-time/part-time)
- Grade repetition
- Head Start for children 7 and under



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# 2014 SIPP: Content Highlights

## Labor Force:

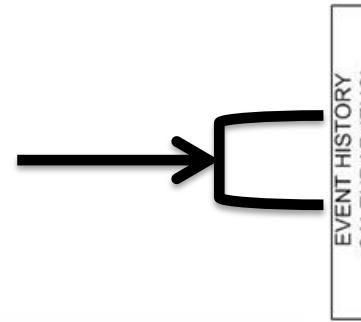
- Up to 7 discrete job/business timelines, each with 2 spells possible
- Timeline for additional work beyond the first 7 jobs
- Type of pay/pay rate
- Job earnings and business profits
- # of hours usually worked per week
- Changes in earnings or hours worked (up to 3)
- Industry, occupation, and class of worker
- Business/employer name, size, type, address
- Union status
- Incorporation status
- Presence of partners (business)
- Time away without pay



# 2014 SIPP: Content Highlights

## Unemployment:

- Spells of unemployment
- Time away from work
- Time out of the labor force
- Reason not working
- Availability for work
- Reason not available



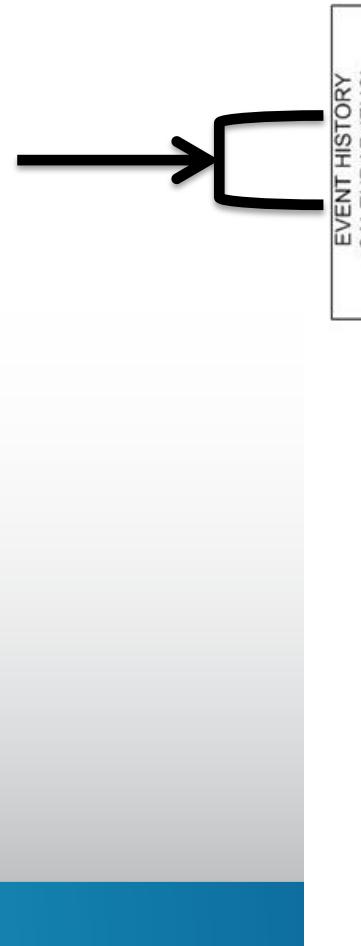
# 2014 SIPP: Content Highlights

## Commuting:

- Mode(s) of travel
- Time to work
- Miles to work
- Costs for a typical week
- Reimbursement of costs

## Work Schedule:

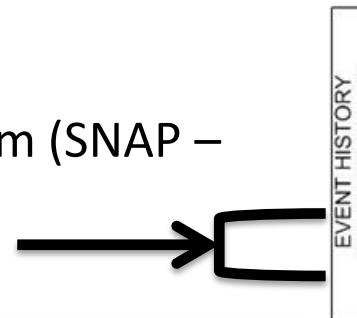
- Days worked
- Start and stop times
- Working from home
- Type of schedule
- Reason for schedule



# 2014 SIPP: Content Highlights

## Programs:

- Supplemental Security Income (SSI)
- Temporary Assistance for Needy Families (TANF)
- Pass-through child support payments
- Supplemental Nutrition Assistance Program (SNAP – Food Stamps)
- General Assistance
- Women, Infants, and Children's Nutrition Program (WIC)

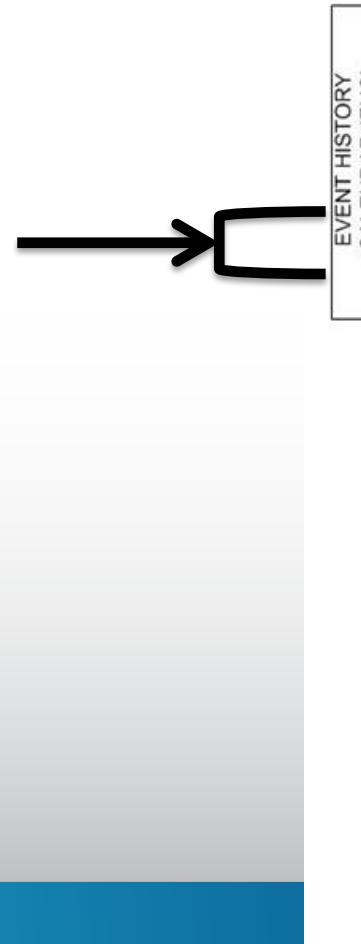


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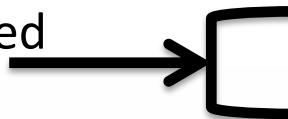
- Up to 3 spells per year recorded for each program
- Who in the household is covered
- Ownership of the coverage
- Reasons for starting and stopping
- Amount received each month
- Up to three changes in amounts



# 2014 SIPP: Content Highlights

## Health Insurance (in EHC):

- Private, Medicare, Medicaid, Military, and Other Coverage timelines
- Two timelines for private coverage to allow overlapping spells
- Who in the household is covered
- Whether anyone outside household covered
- Ownership of the coverage
- Type of coverage
- Cost
- Type of private plan
- Type of deductible



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# 2014 SIPP: Content Highlights

## Health Insurance Follow-up (post-EHC):

- State-based health insurance exchange use  
(*moving into EHC at spell level for 2015+*)
- Premiums and reimbursement  
(*moving into EHC at spell level for 2015+*)
- Reconciliation of time without coverage
- Reasons for not being covered
- Reasons no private if employed but not covered
- Reasons no public if not covered at all

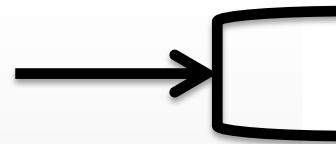


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# 2014 SIPP: Content Highlights

## Programs (Annual and Other):

- Paid care of children or disabled persons so that a person could work, attend training, or look for work in December of reference year
- Total cost of that care in December
- VA benefits (monthly amts.)
- Social Security retirement income and deductions for Medicare (monthly amts.)
- Worker's compensation (monthly amts.)
- Unemployment compensation (monthly amts.)
- Energy assistance

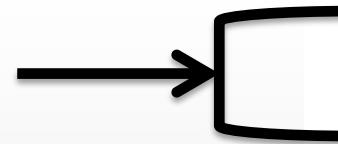


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# 2014 SIPP: Content Highlights

## Programs (Annual and Other):

- Free and reduced-price meal programs
- Lump-sum payments
- Disability income
- Retirement income
- Miscellaneous cash income
- Survivor benefits
- Child support and alimony received
- Support payments made
- EITC receipt and tax filing status
- Other training, food, clothing, cash, and housing assistance



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# 2014 SIPP: Content Highlights

## Assets – Income, Joint Holdings, and Balances/Values for:

- Checking and savings
- Money market accounts or funds
- Certificates of deposit
- Mutual funds
- Stocks
- Municipal and corporate bonds
- Government securities and savings bonds
- Educational savings accounts
- Rental property and rental property mortgage balance
- Miscellaneous investments



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# 2014 SIPP: Content Highlights

## Other Assets:

- Real estate owned, market value, and balance owed
- Vehicles (up to 3 per household):
  - Use
  - Make
  - Model
  - Year
  - Balance owed
- Business value and debt
- Retirement account balances
- Unsecured liabilities

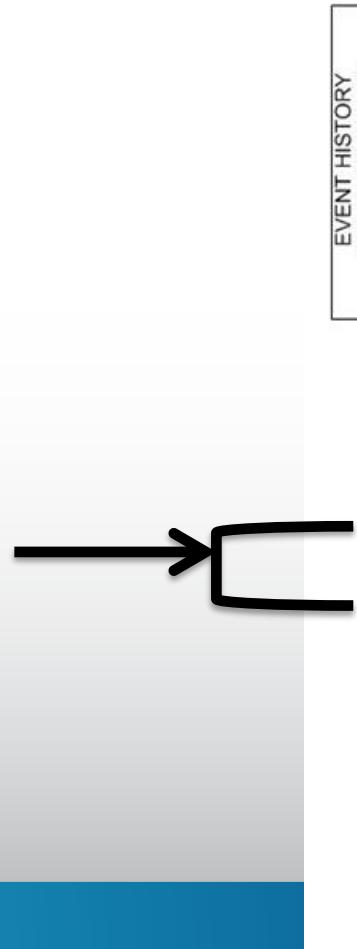


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# 2014 SIPP: Content Highlights

## Medical Expenditures:

- Overall health status
- Medical out-of-pocket expenses
- Health care utilization
- Hospitalization
- Sick days
- Doctor visits
- Dental visits/teeth lost
- Drug coverage
- Insurance premium payments
- Medical visits by uninsured



# 2014 SIPP: Content Highlights

## Disability:

- Sensory disabilities (sight and hearing)
- For adults: Serious difficulty concentrating, remembering, making decisions, walking or climbing stairs, dressing or bathing, doing errands, finding a job or remaining employed, prevented from working
- For children: Serious difficulty concentrating, remembering, making decisions, walking or climbing stairs, dressing or bathing, playing with children of the same age, doing regular school work
- For young children: A developmental condition or delay that limits ordinary activity
- SSA: Disability section in the 2014 supplement



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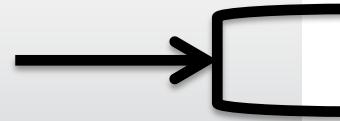
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## Fertility:

- Roster and ages for children birthed/fathered
- Identification of 'other parent' if not resident, enabling multi-partner fertility measure
- Grandparent indicator

## Parents' Nativity and Mortality:

- Asked about biological parents
- Collected for both mother and father
- Date of birth
- Country of birth
- Mortality status
- Month/year of death



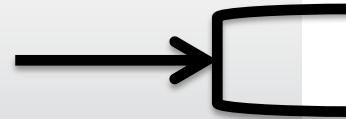
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## Child Care:

- Type of arrangements used
- Which children used each
- Weekly amount paid for child care
- Assistance with costs
- Time lost from work related to child care

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# 2014 SIPP: Content Highlights

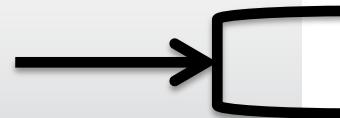
## Child Well-Being:

- Eating dinner with parents
- Reading to and outings with children under 6
- School engagement, school effort
- Grade repetition, suspension, expulsion
- Gifted classes
- Sports, lessons, club participation, religious lessons

## Adult/Material Well-Being:

- Problems with housing, pests, plumbing
- Environmental noise, trash, safety
- Ability to pay mortgage or utilities

EVENT HISTORY CALENDAR (EHC)	Address verification
	Sample address characteristics and coverage
	Roster creation and demographics
	Type 2 Roster/Info
	Additional person level demographics
	Income and program screener
	Residence History
	Marriage and Cohabitation
	School Enrollment
	Labor Force (Jobs, Businesses, Contingent Work, Unemployment, Not in Labor Force, Commuting, Work Schedule)
	Programs (SSI, FS, TANF, GA, WIC)
	Health Insurance (Private, Medicare, Medicaid, Military, Other)
	Health insurance follow-up
	Dependent care expenses
	Social Insurance - Annual Programs - Other GI - Lump Sum - Child Support
	Assets / Balances
	Health (Medical Expenditures - Utilization, Disability)
	Fertility, Child Care, Child Well-Being
	Housing - Material Wellbeing, Food Security, Basic Needs
	Wrap-up and Missing Follow-up visit/call Info
	Interview closeout
	Contact history instrument (CHI) with Neighborhood Observations Module

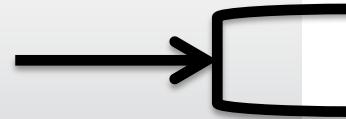


# 2014 SIPP: Content Highlights

## Food Security:

- Able to buy enough food
- Able to eat balanced meals
- Cut size of meals, and, if so, how often
- Defer food to children
- Hungry because not enough money for food

EVENT HISTORY CALENDAR (EHC)	Address verification
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# Demo of SIPP 2014 instrument

# 2014 SIPP Contents / Dependent Content

## Front Sections

- Sample and Coverage
- Address
- Roster
- Demographics

## EHC

- Residency
- Marital history
- Educational enrollment
- Jobs/Time not working
- Program receipt
- Health insurance

## Post-EHC Questions

- Health insurance
- Dependent care
- Non-job income
- Program income
- Asset ownership
- Household expenses
- Health care utilization
- Medical expenditures
- Disability
- Fertility history
- Biological parents' nativity and mortality
- Child care
- Child well-being
- Adult well-being

## Closing Sections

- Respondent Identification Policy
- Contact information
- Moving intentions

# The 2011 SIPP-EHC Instrument – Design & Dependent Data

Re-Engineered SIPP 2011 Ver 3.29--12/08/2010

Ctrl+P - Previous Topic Ctrl+N - Next Topic F3-Check Progress F10-Exit EHC

Topic	REFERENCE YEAR 2010												INTERVIEW YEAR 2011				
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Landmarks																	
Residency																	
Marital History																	
Education																	
Precision Welding																	
self																	
Job 3																	
Job 4																	
Job 5																	
Job 6																	
Job 7																	
More Jobs (if any)																	
No Job																	
SSI																	
Food Stamps																	
TANF																	
Gen. Assist.																	
WIC																	
Private 1																	
Private 2																	
Medicare																	
Medicaid																	
Military																	
Other Coverage																	

(For example, any births or deaths in your family? Divorces or marriages? A vacation? An accident or an illness? Changes in your employment? A residence change? Or anything else that was unusual or memorable?)

**Landmarks**

**If necessary, probe especially for events that happened early in the year.**

In this section of the interview we are interested in your income and other circumstances, since January 1st of 2010. Sometimes, it's easier for people to remember dates from the past if they think about other important events in their lives, or what we call 'memory anchors.'

1) Yes  
 2) No  
 3) DK/RF

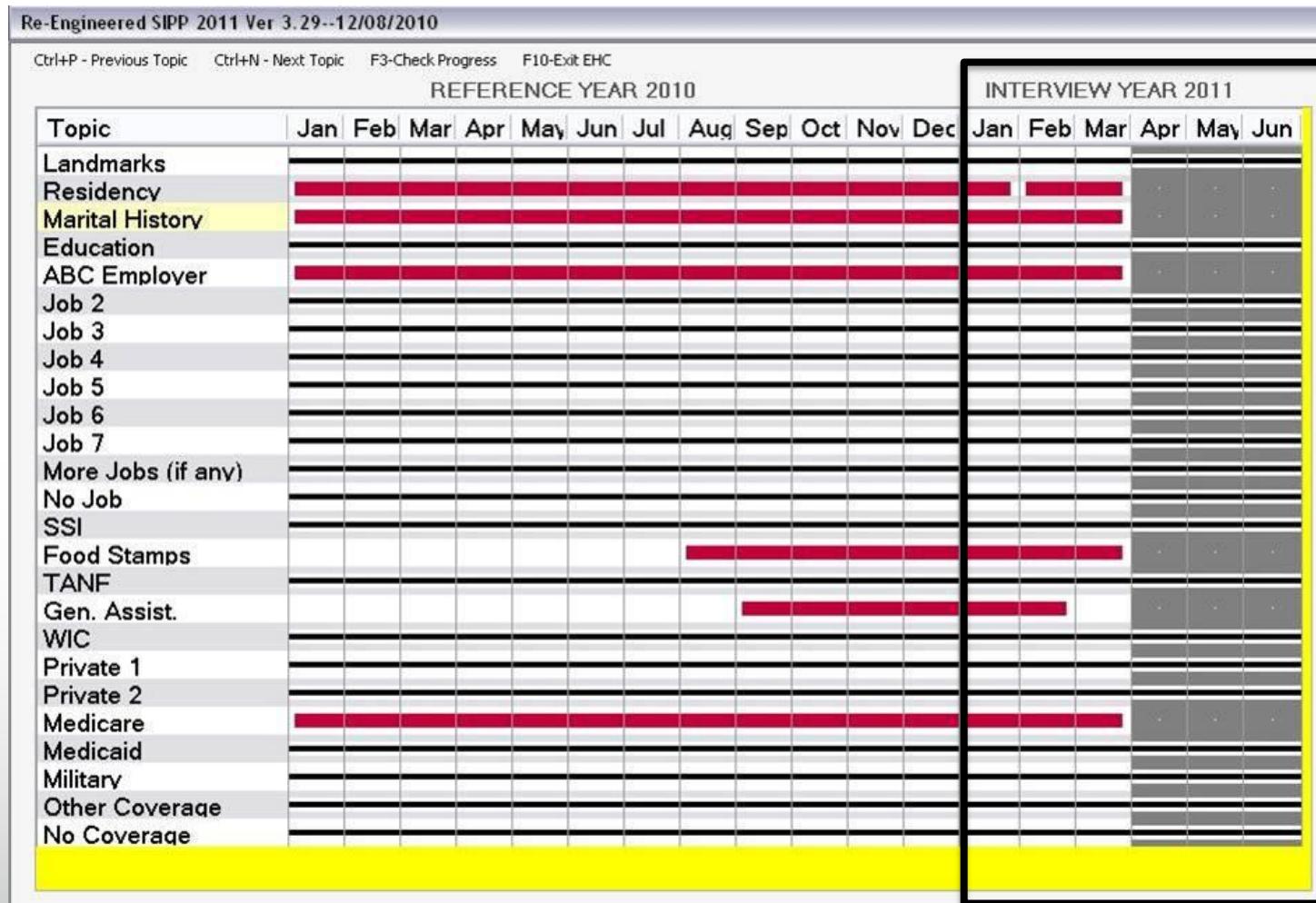
1 , 2 , 0-New

Period:

Set Period

From:  To:  OK

# 2011 SIPP-EHC Completed Calendar



# 2014 SIPP-EHC Completed Calendar – Showing Dependent Data

Re-Engineered SIPP 2014 Ver 6.17--12/06/2013  
F3-Check Progress F10-Exit EHC

Topic	REFERENCE YEAR 2013						INTERVIEW YEAR 2014											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Residency																		
Marital History																		
Education																		
Job 1																		
Job 2																		
Job 3																		
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Job 6																		
Job 7																		
More Jobs (if any)																		
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Gen. Assist.																		
WIC																		
Private 1																		
Private 2																		
Medicare																		
Medical Assista...																		
Military																		
Other Coverage																		

**Residency**

Complete spells representing information that was reported last time, but not active at the time of the interview. **Should be left alone.**

Provisional spells representing information that was reported last time, and current at the time of the interview. **Needs to be extended.**

I'm showing when we talked in June of 2013, you were living at this address.

Have you lived at 110 CAIO DRIVE continuously since June of 2013?

Dependent Text

The information displayed here changes depending on the dependent information.

Jan 13 - Feb 13

Set Period

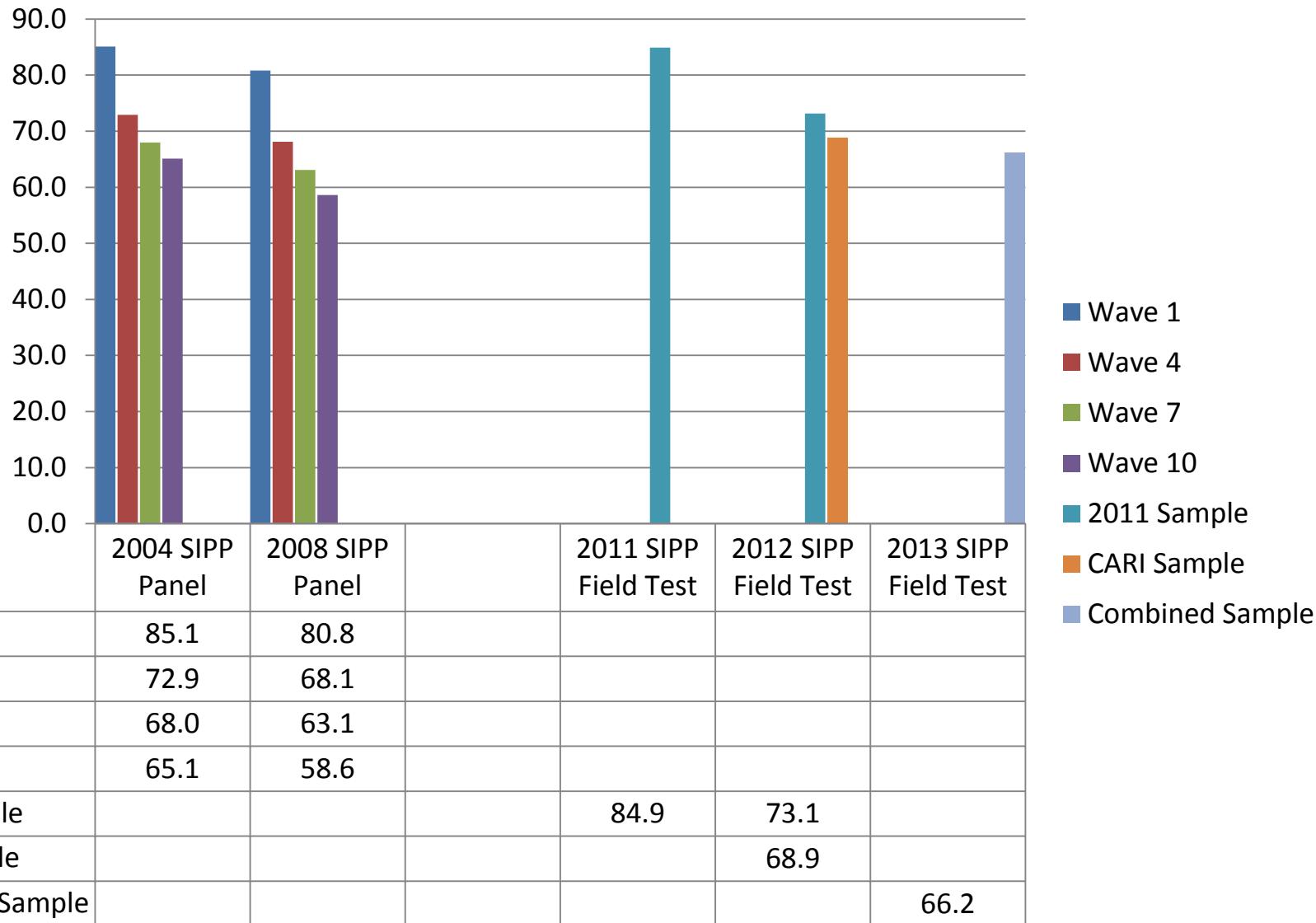
From:  To:  OK

• All months of the reference period must be accounted for; this includes both 2013 PLUS any months to date in 2014.  
 • A maximum of 5 addresses is collected per household member for the reference period.  
 • When recording changes in residences, FROM and TO months should be selected for the residence where the respondent lived for the majority of the month.

# SIPP Re-engineering Field Test Plans

- Proof of concept test - *Sample, design, results*
  - 2008 paper and pencil re-interview test
- EHC CAPI test - *Hurdles and highlights*
  - 2010 Integrated Blaise and C# instrument prototype
- CAPI revised test
  - 2011 Test improvements to the Wave 1 instrument, training, and expand sample to all regional offices.
  - Inter-wave locating experiment
  - 2012 Test Wave 2 concepts and instrument, examine movers and attrition issues, dependent interviewing methods and refine training.
  - 2013 Wave 3 interview allows household members to return and additional mover and dependent interviewing evaluation
- 2014 SIPP EHC-based instrument is the production SIPP instrument
  - *A new Phoenix "A Bird of a Different Color"*

# Crude Response Rates for Tests, 2004 and 2008 Panels



# Innovation

- Type-Z model-based imputation
  - informed by administrative records
  - operationalizing methods discussed in the early 1990's - sequential regression multiple imputation
- CARI – Audio Recorded Interviews
  - Monitoring and quality
  - Companion or substitution for reinterview
- Incentive experiment
  - Model based and adaptive design to maximize R-indicator
  - Revise discretionary practices which may not have efficiently administered incentive distribution

# Innovation

- Integration of paradata streams for management and evaluation (sources currently used in SIPP)
  - Audit trail data from the Blaise/C# instrument
  - Certification test for interviewer training
  - Interviewer characteristics
    - Census experience
    - Prior SIPP experience
    - Supervisory status
    - Demographics
  - Contact history instrument
  - Mileage, case load, supervisor observation, hours billed
  - Neighborhood observation
  - Regional office progress management application data
  - Interviewer debriefing

# Timeline for Data and Products

## Data Collection

- Slow start, but on track, scheduled for closeout at the end of May
- Instrument output available now from February collection
- Continued releases of instrument output during collection
- Full 2014 wave 1 unedited file available in June 2014

# Timeline for Data and Products

## Data Processing

- Type-Z model refinement  
(agreements proceeding with SSA and IRS)
- Section edits in development – completion target mid-summer 2014
- Public use specifications and disclosure avoidance development in progress – approval in fall 2014
- Initial public use file release by May 2015

# Timeline for Data and Products

## Data Products

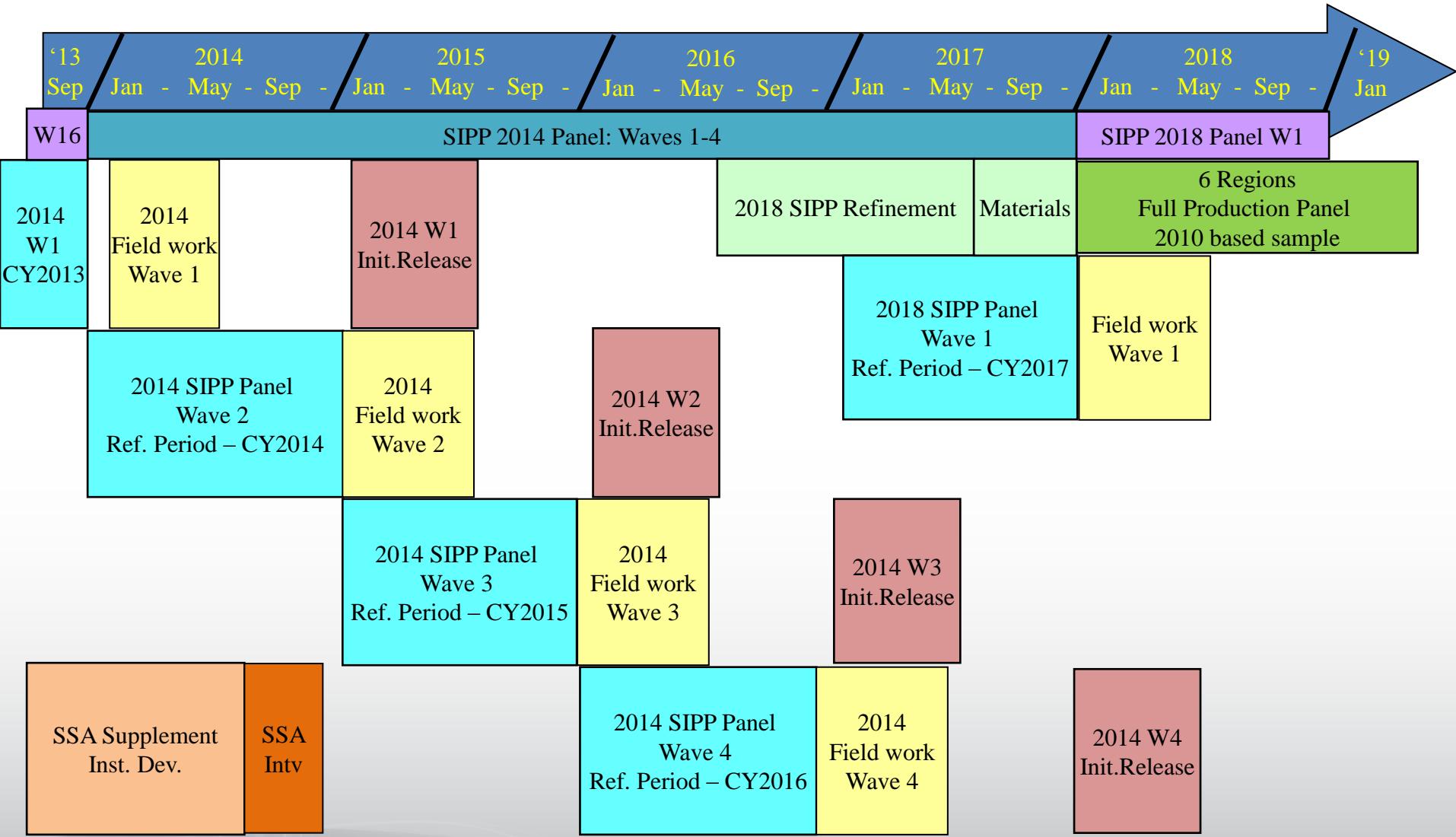
- Person-month data file for calendar year 2013
- SIPP Synthetic Beta – planned inclusion of 2014 panel data
- Research briefs on key topics to be released annually with data release
- Regular P70-series research briefs
- Users guide
- Orlin data access system (internal and external)

# Social Security Administration Supplement

- A reimbursed supplement to meet stakeholder needs
- Sample: All interviewed Wave 1 household members
- Administered by telephone in the CATI centers
- Contents:
  - Retirement and pensions
  - Adult and child disability
  - Marital history
- When – Interviews in September and October 2014
- Messaging

# SIPP-EHC Implementation for 2014 and Beyond

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Thank you!

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[HTTP://www.census.gov/SIPP](http://www.census.gov/SIPP)



