

APPENDIX C

STEP Monitoring System Sample Correspondence to Respondents

E-mail Notification of Collection Timeframe

New Institution

Dear [INSERT PI NAME]:

****Please share the following information and with any partner institutions that will be submitting data.****

The online data collection system for the National Science Foundation (NSF) Science, Technology, Engineering, and Mathematics Talent Expansion Program (STEP) is scheduled to open on February 17. The deadline for submitting all data is April 21.

We look forward to your participation in this data collection effort. Reporting this information is part of the terms of your STEP award. Your cooperation will help us provide NSF with information needed to meet its Federal reporting requirements and measure the attainment of its strategic goals.

Each institution must enter and submit its own data unless alternate arrangements have been made. Lead institutions will be able to monitor the progress of their partner institutions, view their data, and send them e-mail reminders through the system. Lead institutions are ultimately responsible for the compliance of their partners.

Please review the list of partner institutions below. These are the partners that were indicated in your grant application. Only undergraduate degree-granting academic institutions are included. For each partner institution, please indicate whether the institution is a 2-year or 4-year institution, and please provide contact information (name and e-mail address) for the individual at the institution responsible for the completion/submission of the annual survey – we call this person the “Institution Leader.” This is usually not the president of the institution, but rather the person who will be overseeing the completion of the survey at the partner institution. Please provide this information no later than **February 12.**

[INSERT PARTNER INSTITUTIONS]

Login Information

When the collection opens each institution will receive a single institution ID and password. This login information is to be shared by everyone at the institution involved in responding to the survey. By default, the login information is initially provided to the principal investigator (PI) for lead institutions and the “Institution Leader” (i.e., the individual responsible for the completion/submission of the annual survey) for partner institutions.

Survey Information

All undergraduate degree-granting academic institutions that are part of your STEP award will be reporting two years of data. You will first report data for the

reporting period July 1, 2007–June 30, 2008 (contact information, institution definitions, and student demographics only); these will be your baseline data. Once these data have been submitted to NSF, you will enter and submit data for the current reporting period (July 1, 2008–June 30, 2009) (contact information, institution definitions, student demographics, strategies & activities, challenges, other influences, and student participation). **Both years of data must be submitted by the April 21 deadline.**

Information about the STEP online data collection system was e-mailed to you following last year's grantees' meeting. This year's survey is essentially the same as last year's except that we have updated some of the instructions and help materials to improve clarity.

Points to Keep in Mind

- All Student Demographics data (Majors, Degrees Granted, and Transfers) should include U.S. citizens and permanent residents only.
- If your institution considers Hispanic to be a race equivalent to White, Black, Asian, etc., please report all students classified by your institution as Hispanic in the Student Demographics section under 'Hispanic or Latino, Race Not Reported or Unknown,' and report all other students under the appropriate race categories under 'Not Hispanic or Latino.' Report unclassified students in the 'Neither Ethnicity nor Race Reported' row.
- Strategies and Activities must be classified with one of the following statuses:
 - Planned: The project intends to use this strategy/activity and may be carrying out planning discussions and preparations but has not begun trials or implementation of the strategy/activity.
 - Implemented: The project has begun trials of the strategy/activity. The project may still be in the process of gathering information about the use of the strategy/activity in order to make modifications, or the project may have institutionalized the use of the strategy/activity.
 - Discontinued: The project has finished trials of the strategy/activity and will not be pursuing this strategy/activity.
- In the Student Participation section of the survey you are asked to report the number of **distinct** students (undergraduate and high school students separately) who actively participated in the strategies/activities carried out under your STEP grant during the reporting period. This should be the unduplicated cumulative total from all strategies/activities reported in the Strategies & Activities section -- i.e., the sum of all students reported minus any students participating in multiple strategies/activities (undergraduate and high school students separately). No quality distinctions should be made between the student counts reported in the Strategies & Activities section and those reported in the Student Participation section. The same criteria should be applied for both sections in determining the number of students actively participating.

- As part of the final submission procedure, survey respondents will be asked to approximate the number of person-hours required to complete the survey. This includes the time to obtain as well as enter the requested data.

If you have any questions, please contact STEP Technical Support at step@qrc.com or (866) 227-7127.

Sincerely,

Mary Sanders
STEP Project Manager
ICF Macro

Returning Institution

Dear [INSERT PI FIRST NAME] [INSERT PI LAST NAME]:

The online data collection system for the National Science Foundation (NSF) Science, Technology, Engineering, and Mathematics Talent Expansion Program (STEP) is scheduled to open on February 17. The deadline for submitting all data is April 21.

We look forward to your participation in this data collection effort. Reporting this information is part of the terms of your STEP award. Your cooperation will help us provide NSF with information needed to meet its Federal reporting requirements and measure the attainment of its strategic goals.

Each institution must enter and submit its own data unless alternate arrangements have been made. Lead institutions will be able to monitor the progress of their partner institutions, view their data, and send them e-mail reminders through the system. Lead institutions are ultimately responsible for the compliance of their partners.

Survey Information

You will be reporting data for the current reporting period (July 1, 2008–June 30, 2009) only.

This year's survey is essentially the same as last year's except that we have updated some of the instructions and help materials to improve clarity.

We encourage you to review your data from the last collection cycle in preparation for the upcoming collection. You may view a read-only version of last year's survey at <https://surveys.qrc.com/step>. The system also offers the option to print a hardcopy of your data and/or to download your data to a Microsoft Excel spreadsheet through the **Print My Data** and **Download My Data** features on the left side of the **Main Menu** screen. If you need us to resend your login information from last year, please let us know.

The online system will allow you to carry forward data from the previous reporting

period (such as contact information, institution definitions, disciplines offered, strategies/activities, challenges, other influences, and student participation), in order to make the data entry process easier. You may then edit these data as needed for the period for which you are reporting.

Points to Keep in Mind

- All Student Demographics data (Majors, Degrees Granted, and Transfers) should include U.S. citizens and permanent residents only.
- If your institution considers Hispanic to be a race equivalent to White, Black, Asian, etc., please report all students classified by your institution as Hispanic in the Student Demographics section under 'Hispanic or Latino, Race Not Reported or Unknown,' and report all other students under the appropriate race categories under 'Not Hispanic or Latino.' Report unclassified students in the 'Neither Ethnicity nor Race Reported' row.
- Strategies and Activities must be classified with one of the following statuses:
 - Planned: The project intends to use this strategy/activity and may be carrying out planning discussions and preparations but has not begun trials or implementation of the strategy/activity.
 - Implemented: The project has begun trials of the strategy/activity. The project may still be in the process of gathering information about the use of the strategy/activity in order to make modifications, or the project may have institutionalized the use of the strategy/activity.
 - Discontinued: The project has finished trials of the strategy/activity and will not be pursuing this strategy/activity.
- In the Student Participation section of the survey you are asked to report the number of **distinct** students (undergraduate and high school students separately) who actively participated in the strategies/activities carried out under your STEP grant during the reporting period. This should be the unduplicated cumulative total from all strategies/activities reported in the Strategies & Activities section -- i.e., the sum of all students reported minus any students participating in multiple strategies/activities (undergraduate and high school students separately). No quality distinctions should be made between the student counts reported in the Strategies & Activities section and those reported in the Student Participation section. The same criteria should be applied for both sections in determining the number of students actively participating.
- As part of the final submission procedure, survey respondents will be asked to approximate the number of person-hours required to complete the survey. This includes the time to obtain as well as enter the requested data.

If you have any questions, please contact STEP Technical Support at step@qrc.com or (866) 227-7127.

Sincerely,

Mary Sanders
STEP Project Manager
ICF Macro

E-mail Notification of System Launch

New Institution

Dear [INSERT PI NAME]:

We are pleased to announce that the online data collection system for the National Science Foundation (NSF) Science, Technology, Engineering, and Mathematics Talent Expansion Program (STEP) is now open. The deadline for submitting all data is April 21.

Log in to STEPWeb by entering the institution ID and password specified below at <https://surveys.qrc.com/step>.

Institution ID: [INSERT INSTITUTION ID]

Password: [INSERT PASSWORD]

You may change your password upon logging into the system. Please communicate any password changes with all parties at your institution involved in the data entry process.

You will be providing two years of data. You will first report data for the reporting period July 1, 2007–June 30, 2008 (contact information, institution definitions, and student demographics only); these will be your baseline data. Once these data have been submitted to NSF, you will enter and submit data for the current reporting period (July 1, 2008–June 30, 2009) (contact information, institution definitions, and student demographics **PLUS** strategies & activities, challenges, other influences, and student participation). **Both years of data must be submitted by the April 21 deadline.**

If you have any questions, please contact STEP Technical Support at step@qrc.com or (866) 227-7127.

Thank you very much for your assistance.

Sincerely,

Susan Hixson
Program Director, STEP
National Science Foundation

Mary Sanders
STEP Project Manager
ICF Macro

Returning Institution

Dear [INSERT PI NAME]:

We are pleased to announce that the online data collection system for the National Science Foundation (NSF) Science, Technology, Engineering, and Mathematics Talent Expansion Program (STEP) is now open. To expedite the data entry process, institutions that have not logged in by March 3 will be contacted by phone. The deadline for submitting all data is April 21.

Log in to STEPWeb by entering the institution ID and password specified below at <https://surveys.qrc.com/step>.

Institution ID: [INSERT INSTITUTION ID]
Password: [INSERT PASSWORD]

You may change your password upon logging into the system. Please communicate any password changes with all parties at your institution involved in the data entry process.

You will be reporting data for the current reporting period (July 1, 2008–June 30, 2009) only.

If you have any questions, please contact STEP Technical Support at step@qrc.com or (866) 227-7127.

Thank you very much for your assistance.

Sincerely,

Susan Hixson
Program Director, STEP
National Science Foundation

Mary Sanders
STEP Project Manager
ICF Macro

E-mail Reminders for Awardees

New Institution

Dear [INSERT PI NAME],

Thank you for your efforts toward completing the NSF STEP annual survey for [INSERT INSTITUTION NAME].

This is just a reminder that we have reached the mid-point of the collection cycle. The survey will be closing on **Wednesday, April 21, 2010.**

As stated in the opening letter, both your baseline data and your data for the current reporting period are due by the April 21 deadline.

If you should have any questions or concerns please contact STEP Technical Support at step@qrc.com or 866-227-7127.

Thanks again,
Jared Malin
STEP Technical Support

Returning Institution

Dear [INSERT PI NAME],

Thank you for your efforts toward completing the NSF STEP annual survey for [INSERT INSTITUTION NAME].

This is just a reminder that we have reached the mid-point of the collection cycle. The survey will be closing on **Wednesday, April 21, 2010.**

If you should have any questions or concerns please contact STEP Technical Support at step@qrc.com or 866-227-7127.

Thanks again,
Jared Malin
STEP Technical Support

New Institution

Dear [INSERT PI NAME],

Thank you for your efforts towards completing the NSF STEP annual survey for [INSERT INSTITUTION NAME]. The survey is scheduled to close in less than one week. Please continue to enter data and submit your survey no later than **Wednesday, April 21.**

Please note that both your baseline data and your data for the current reporting period are due by the April 21 deadline.

If you will not be able meet the deadline, you must request an extension prior to April 21. To request an extension, please e-mail STEP Technical Support at step@qrc.com, providing an explanation for the delay and a specific date by which you will complete your submission. You will receive a written response regarding your extension request.

If you have any questions or concerns, please contact STEP Technical Support at step@qrc.com or (866) 227-7127.

Sincerely,

Jared Malin
STEP Technical Support

Returning Institution

Dear [INSERT PI NAME],

Thank you for your efforts towards completing the NSF STEP annual survey for [INSERT INSTITUTION NAME]. The survey is scheduled to close in less than one week. Please continue to enter data and submit your survey no later than **Wednesday, April 21.**

If you will not be able meet the deadline, you must request an extension prior to April 21. To request an extension, please e-mail STEP Technical Support at step@qrc.com, providing an explanation for the delay and a specific date by which you will complete your submission. You will receive a written response regarding your extension request.

If you have any questions or concerns, please contact STEP Technical Support at step@qrc.com or (866) 227-7127.

Sincerely,

Jared Malin
STEP Technical Support

Dear [INSERT PI NAME],

I am following up on the voicemail I left for you last Friday. The deadline for submitting your STEP data was this past Wednesday, April 21. You must request an extension immediately. Please provide a date by which you expect to complete your data entry, as

well as the reason for the delay.

Please let me know if you have any questions.

Thank you,

Jared Malin
STEP Technical Support
ICF Macro
step@qrc.com
(866) 227-7127