Invitation

To: Primary contact
Cc: others normally included in survey contacts
From: NSF Higher Education R&D Survey
Re: Contribute to changes on NSF-NCSES HERD Survey ([[inst_id]])

Dear [[firstname]] [[lastname]]:

Thank you, again, for completing the FY 2019 Higher Education Research and Development (HERD) Survey. I appreciate your time and efforts.

I am writing today to request your assistance on a proposal for the next cycle of the survey. Before we finalize the survey for FY 2020, we would like to get feedback from current survey respondents. The National Center for Science and Engineering Statistics within the National Science Foundation is considering adding two new questions about R&D personnel to the FY 2020 survey. The first would ask for the number of personnel by demographic categories and would replace the current question 15. The second would ask for full-time equivalents (FTEs) for personnel at your institution who perform R&D.

If you are willing to help, we would ask you to do three things:

1) **Participate in an initial interview by phone** to understand how you would go about answering these questions. We would like to complete the interviews by [enter date]. The interview will be less than 30 minutes.
2) **Complete the proposed new questions.** This step will likely involve working across offices at your organization (e.g., Human Resources, Institutional Research). The responses you provide will only be used for our internal question development.
3) **Participate in a final interview by phone.** The interview will be less than 30 minutes. We will ask about your experience completing the proposed new questions.

If you, or someone else from the team at [institution name] that completes the HERD survey, are interested in participating, please contact Melinda Scott from our survey staff at ICF at support@herdsurvey.org or 866-936-9376. She will schedule a time for the interview. If we do not hear from you by [date], we will contact you again.

Thank you for your help and for your continued participation in the NSF HERD Survey.

Sincerely,

Michael Gibbons
Project Officer, Higher Education R&D Survey
National Center for Science and Engineering Statistics
National Science Foundation

Invitation – Reminder

To: Primary contact
Cc: others normally included in survey contacts
From: NSF Higher Education R&D Survey
Re: Please reply: Contribute to changes on NSF-NCSES HERD Survey ([[inst_id]])

Dear [[firstname]] [[lastname]]:

Last week we sent you an e-mail asking for your assistance on some changes we are considering for the Higher Education Research and Development (HERD) Survey. We want to be sure that the universities understand the questions and can provide the newly requested data before we implement any changes. This process is critical to the survey's development. We are only inviting a few respondents to participate. We would greatly appreciate your input on these new questions.

We are thinking about adding two questions about R&D personnel to the FY 2020 survey. The first would ask for the number of personnel by demographic categories and would replace the current question 15. The second would ask for full-time equivalents (FTEs) for personnel at your institution who perform R&D.

Before we finalize the survey, we would like to get some feedback from current survey respondents. If you are willing to help, we would ask you to do three things:

1) **Participate in an initial interview by phone** to understand how you would go about answering these questions**.** We would like to complete the interviews by [enter date]. The interview will be less than 30 minutes.
2) **Complete the test questions.** This step will likely involve working across offices at your organization (e.g., Human Resources, Institutional Research). The responses you provide will only be used for our internal question development.
3) **Participate in a final interview.** The interview will be less than 30 minutes. We will ask about your experience completing the proposed new questions.

If you, or someone else from the team at [institution name] that completes the HERD survey, are interested in participating, please contact Melinda Scott from our survey staff at ICF at support@herdsurvey.org or 866-936-9376. She will schedule a time for the interview.

Thank you for your help and for your continued participation in the NSF HERD Survey.

Sincerely,

Michael Gibbons
Project Officer, Higher Education R&D Survey
National Center for Science and Engineering Statistics
National Science Foundation

Confirmation of First Interview

To: Primary contact email (or other person scheduled)
CC: other attendees, including relevant NCSES and ICF staff
From: NSF Higher Education R&D Survey
Re: Confirming interview ([[inst_id]])

Dear [[firstname]] [[lastname]]:

Thank you for agreeing to talk to us about two proposed new questions that may be added to the FY 2020 Higher Education R&D Survey (HERD) related to head counts and full-time equivalents (FTEs) for R&D personnel at your institution.

The phone call is scheduled for **DayoftheWeek, Month XX, at X:XX AM/PM (EDT/CDT/MDT/WDT)**. At that time please call our conference line at 1-855-423-6338, conference ID [interviewer id]. [insert interviewer name] will be leading the interview. I would be happy to send you a Microsoft Outlook invitation, if you prefer.

If you have further questions or need to reschedule, you may reach me by email at support@HERDsurvey.org or call toll-free at (866) 936-9376.

Thank you very much for your help.

Sincerely,
Melinda Scott
Data Collection Specialist
Higher Education R&D Survey
ICF

Reminder of First Interview

This will be sent to institutions one business day before their scheduled interview, but only if they received the first confirmation at least 4 days before the scheduled interview.

To: Primary contact email (or other person scheduled)
CC: other attendees, including relevant ICF staff
From: NSF Higher Education R&D Survey
Re: Interview Reminder ([[inst_id]])

Dear [[firstname]] [[lastname]]:

This is just a reminder about our phone call scheduled for **DayoftheWeek, Month XX, at X:XX AM/PM (EDT/CDT/MDT/WDT)**. At that time please call my conference line at 1-855-423-6338, conference ID [interviewer id].

We will send you a copy of your completed FY 2019 survey with the new questions included prior to the interview.

If you have any trouble accessing the attachment, have further questions or need to reschedule, you may reach me by email at support@HERDsurvey.org or call toll-free at (866) 936-9376.

Thank you very much for your help.

Sincerely,
[Interviewer name]
Project Director
Higher Education R&D Survey
ICF

Reminder to Complete Test Questions/Schedule Second Interview

To: Primary contact email (or other person scheduled)
CC: other attendees, including relevant NCSES and ICF staff
From: NSF Higher Education R&D Survey
Re: Confirming interview ([[inst_id]])

Dear [[firstname]] [[lastname]]:

Now that you have had time to work on completing the test questions for the HERD Survey, we'd like to schedule your final interview. When you have completed the questions, please send them to us in advance of our next discussion.

We'd like to schedule your final 30 minute interview where we'll ask about your experience completing the survey questions. If you have availability in the next week [insert dates], please contact me at support@herdsurvey.org or 866-936-9376. I will schedule a time for the phone call.

Thank you very much for your help.

Sincerely,
Melinda Scott
Data Collection Specialist
Higher Education R&D Survey
ICF

Reminder of Second Interview

This will be sent to institutions one business day before their scheduled interview, but only if they received the first confirmation at least 4 days before the scheduled interview.

To: Primary contact email (or other person scheduled)
CC: other attendees, including relevant ICF staff
From: NSF Higher Education R&D Survey
Re: Interview Reminder ([[inst_id]])

Dear [[firstname]] [[lastname]]:

This is just a reminder about our phone call scheduled for **DayoftheWeek, Month XX, at X:XX AM/PM (EDT/CDT/MDT/WDT)**. At that time please call my conference line at 1-855-423-6338, conference ID [interviewer id].

Please be sure to send us your completed questions in advance of the call.

If you have any trouble accessing the attachment, have further questions or need to reschedule, you may reach me by email at support@HERDsurvey.org or call toll-free at (866) 936-9376.

Thank you very much for your help.

Sincerely,
[Interviewer name]
Project Director
Higher Education R&D Survey
ICF