

## Introduction

The success of the NLS depends on our ability to communicate with our respondents to entice them to complete their interview. Because many respondents have indicated to us that email, along with texting, are their preferred modes of communication, since the 2021 COVID supplemental survey the NLS used both individual and mass emails to contact respondents. Building on this success, NLS would like to continue to use emails to encourage respondents to schedule their appointments, in addition to sending additional materials encouraging their participation in the survey.

## Process and Data Security

All emails are handled within the NLS boundary by NORC. Mass or 'batch' emails, that is groups of emails that do not require an individual Interviewer (FI or TI) to enter each respondent email and message, use Campaign Enterprise software which is housed on a server within the NLS boundary at NORC. Individual emails (IE from individual interviewers) are sent via an NLS project issued laptop or phone from the FI's NORC email address.

If the email address is undeliverable, NORC will receive an undeliverable response back to our project inbox. After each mass email is sent, updates will be made in NORC's case management system to remove undeliverable emails and correct incorrect email addresses that are reported. Additionally, new email addresses are added to the case management system throughout the round as interviewers communicate with respondents who indicate they wish to be contacted via email. Given the frequency with which NORC will communicate by email with eligible respondents – at least once every 2 years - it is possible that an email address is no longer active for a respondent, but very unlikely that an email address has been assigned by an Internet Service Provider to someone else outside of the sample.

## Email Universe, Selection Criteria, Timeline and Scripts

By default, **only** cases (respondents) marked prefer email contact would be included. NLS keeps track of contact preferences in the interviewer remarks in the locating section. At every interview, respondents have the option to remove or change their emails. The hard copy mailed pre fielding Advance Letter also has information on how to contact us. The NLS sends that letter to every respondent, even if they have not recently done an interview.

## Potential Email Timeline, Scripts and Selection Criteria:

Only cases with email addresses (IE, prefer email contact) are in the universe to receive any emails. Respondents have the ability to remove or change their email during contacting questions asked every round, or at any time by contacting NLS or NORC.

## Mass Emails

| Mass Emails Timeline and Selection Criteria             |                                               |                                                                          |                                             |             |
|---------------------------------------------------------|-----------------------------------------------|--------------------------------------------------------------------------|---------------------------------------------|-------------|
| Phase                                                   | Description                                   | Selection                                                                | Estimated Timeframe                         | Number Sent |
| Start of Field Period                                   | Advance email<br>+ Includes Privacy statement | All cases with email (prefer email contact)                              | Rolling basis as cases are released         | 1           |
|                                                         | Fall Reminder                                 | All released cases (within reason)                                       | Oct/Nov                                     | 1           |
| Mid field period                                        | Winter-Themed reminder email                  | Cases that have not completed or scheduled                               | Jan, March, June                            | Up to 3     |
|                                                         | New Year Mass Email                           | Cases that have not completed or scheduled                               | Early January                               |             |
|                                                         | We haven't heard from you                     | Cases with few interactions                                              | Mid fielding                                | 1           |
| Responding to email contact initiated by the Respondent | Appointment Reminders                         | Those that scheduled an appointment more than 24 hours from today's date | response to appointment scheduled           | 1           |
|                                                         | Thank You Email, Payment Processing           | all completed cases                                                      | after completion when payment is processed  | 1           |
| Closedown                                               | Final Push Offer                              | All non refusal cases left near end of fielding                          | when additional incentive becomes available | 1           |
|                                                         | Last Chance                                   | All non refusal cases left near end of fielding                          | 2 weeks before end of fielding              | 1           |

## Mass Email Scripts:

**Note**, all emails will include the following language:

*If you believe you are not the intended recipient of this message, please notify the sender and delete this email without disclosing, copying, or further disseminating its contents.*

## Advance Email

The Advance letter changes slightly every round and is usually signed by the director. The following is the advance letter for R22 of the NLSY97.

Subject line: You're invited to complete your National Longitudinal Survey of Youth 97 (NLSY97) survey

Welcome to the 22nd round of the NLSY97!

The National Longitudinal Surveys (NLS) is dedicated to its mission: to provide information on the complex relationships between people's labor market activities and other experiences such as education, health, family formation, and economic decision-making throughout their lives. We know that this information is vital to our many data users.

Most U.S. Bureau of Labor Statistics (BLS) surveys are cross sectional, providing a "snapshot" at one point in time. For example, the Current Population Survey (CPS) measures the unemployment rate. From the CPS, we know the percentage of the labor force that is without a job in a given month. In comparison, a longitudinal survey like the NLSY97 repeatedly interviews the same sample members — You! — to collect information on activities in your lives. This enables researchers to analyze transitions over time — like moves to a new job, stints spent out of the labor force, and changes to your work schedule — all while having information on family, health, education, and many other topics that may affect your labor market choices.

To get a sense of the ways this data is used, we encourage you to visit our NLS bibliography page: [www.nlsinfo.org/bibliography-start](http://www.nlsinfo.org/bibliography-start). Here you will find studies that look at employment and earnings in relationship to a myriad of other life events. In fact, over 1,500 journal articles, Ph.D. dissertations, and book chapters have been written using the NLSY97.

These studies affect public policies in many ways. Policymakers often use them directly in planning programs, and news organizations often report their main findings to the general public. And as the NLSY97 is one of BLS's family of surveys, we also invite you to browse the BLS website for information about labor market survey topics of interest: [www.bls.gov](http://www.bls.gov).

Thank you for being the most important part of the NLSY97. We look forward to talking to you soon!

Sincerely,  
Keenan Dworak-Fisher  
Director, National Longitudinal Surveys U.S. Bureau of Labor Statistics

Phone: XXX-XXX-XXX | Email: [nlsy97@NORC.org](mailto:nlsy97@NORC.org) | Text XXX-XXX-XXX with your full name

If you believe you are not the intended recipient of this message, please notify the sender and delete this email without disclosing, copying, or further disseminating its contents.

The survey is authorized under Title 29, Section 2, of the United States Code. The U.S. Office of Management and Budget has approved the questionnaire and has assigned **1220-0109** as the survey's control number. This control number expires on **08/31/2027**. Without OMB approval and this number, we would not be able to conduct this survey. If you have any comments regarding this survey or recommendations for reducing its length, send them to the Bureau of Labor Statistics, National Longitudinal Surveys, 2 Massachusetts Avenue, N.E., Washington, DC 20212.

The Bureau of Labor Statistics, its employees, agents, and partner statistical agencies, will use the information you provide for statistical purposes only and will hold the information in confidence to the full extent permitted by law. In accordance with the Confidential Information Protection and Statistical Efficiency Act (44 U.S.C. 3572) and other applicable Federal laws, your responses will not be disclosed in identifiable form without your informed consent.

BLS may release records to a contractor to compile non-individually identifiable data for use by the general public and federal agencies for research purposes. BLS may provide geographic information to researchers to conduct specific research projects which further the mission and functions of the agency. Such authorized researchers must sign a written agreement making them official agents of the Bureau of Labor Statistics and requiring them to protect the confidentiality of survey participants. These researchers are never provided with the personal identities of participants.

### Themed Reminder Email 1 (Example: Happy Fall)

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| Subject        | Fall is here- Time to complete your NLS Survey                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Email language | <p>Greetings from the NLSY97,</p> <p>We hope this message finds you well and enjoying wonderful weather where you live. We're wondering if it would be possible to conduct your NORC interview sometime this week or this coming weekend. When would you have about an hour to chat by phone?</p> <p>As a long-time participant in the NLSY97 study, you perform a valuable service to your community. By sharing your story, you enrich researchers' understanding of how family, education, and labor interact in the daily lives of Americans.</p> <p>Your information is very important to us, and we want to make it as easy as possible for you to participate in our study, so call us toll-free at (877) 504-1086 or reply to this email to set an appointment.</p> <p>To schedule your appointment online, enter your PIN, [PIN], at <a href="https://nlsy97appointments.norc.org">nlsy97appointments.norc.org</a> to set your interview at your preferred date</p> |

and time. You'll receive confirmation from NORC if you have an email address on file.

You will receive \$[Total Fee] to thank you for your participation by either electronic payment or cash, as you choose.

Thank you for your time and hope to hear from you soon.

Sincerely,  
The NLSY97 Team  
NORC at the University of Chicago

*If you believe you are not the intended recipient of this message, please notify the sender and delete this email without disclosing, copying, or further disseminating its contents.*

*The survey is authorized under Title 29, Section 2, of the United States Code. The U.S. Office of Management and Budget has approved the questionnaire and has assigned 1220-0157 as the survey's control number. This control number expires on 8/31/2024. Without OMB approval and this number, we would not be able to conduct this survey. If you have any comments regarding this survey or recommendations for reducing its length, send them to the Bureau of Labor Statistics, National Longitudinal Surveys, 2 Massachusetts Avenue, N.E., Washington, DC 20212.*

*The Bureau of Labor Statistics, its employees, agents, and partner statistical agencies, will use the information you provide for statistical purposes only and will hold the information in confidence to the full extent permitted by law. In accordance with the Confidential Information Protection and Statistical Efficiency Act (44 U.S.C. 3572) and other applicable Federal laws, your responses will not be disclosed in identifiable form without your informed consent.*

*BLS may release records to a contractor to compile non-individually identifiable data for use by the general public and federal agencies for research purposes. BLS may provide geographic information to researchers to conduct specific research projects which further the mission and functions of the agency. Such authorized researchers must sign a written agreement making them official agents of the Bureau of Labor Statistics and requiring them to protect the confidentiality of survey participants. These researchers are never provided with the personal identities of participants.*

## We Haven't Heard From You

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| Subject        | We haven't heard from you – There is still time to complete your NLSY97 Survey                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Email language | <p>Greetings from the NLSY97,</p> <p>We hope this message finds you well. We know your schedule may be hectic, but we were wondering if it would be possible to conduct your NLSY97 interview sometime this week or this coming weekend. Which day are you available?</p> <p>Your information is very important to us, and we want to make it as easy as possible for you to participate in our study. NORC appreciates your time and commitment. We are offering you [TOTAL FEE] to show our appreciation.</p> <p>To schedule your appointment, simply reply to this email, or call or text me at 1-877-504-1086. To schedule your appointment online, enter your PIN, [PIN], at <a href="https://nlsy97appointments.norc.org">nlsy97appointments.norc.org</a> to set your interview at your preferred date and time.</p> <p>We hope to hear from you soon!</p> <p>Sincerely,<br/>The NLSY97 Team<br/>NORC at the University of Chicago</p> |

## Themed Reminder Email 2 (Example: Winter/End of Year)

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| Subject        | Warm Wishes from the NLSY97                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Email Language | <p>Greetings from the NLSY97,</p> <p>We hope this message finds you well during this busy time at the end of the year. We're wondering if it would be possible to conduct your NORC interview sometime this week or this coming weekend. When would you have about an hour to chat by phone?</p> <p>As a long-time participant in the NLSY97 study, you perform a valuable service to your community. By sharing your story, you enrich researchers' understanding of how family, education, and labor interact in the daily lives of Americans.</p> <p>Your information is very important to us, and we want to make it as easy as possible for you to participate in our study, so call (877) 504-1086 or reply to this email to set an appointment.</p> <p>To schedule your appointment, simply reply to this email, or call (877)</p> |

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|  | <p>504-1086. To set your appointment online, enter your PIN, {PIN%}, at <a href="https://nlsy97appointments.norc.org">nlsy97appointments.norc.org</a> to schedule your interview at your preferred date and time.</p> <p>After completing your interview, you will receive \${Total fee} to thank you for your participation by either electronic payment or cash, as you choose.</p> <p>Thank you for your time, and we hope to hear from you soon.</p> <p>Sincerely,<br/>The NLSY97 Team<br/>NORC at the University of Chicago</p> <p><i>If you believe you are not the intended recipient of this message, please notify the sender and delete this email without disclosing, copying, or further disseminating its contents.</i></p> <p><i>The survey is authorized under Title 29, Section 2, of the United States Code. The U.S. Office of Management and Budget has approved the questionnaire and has assigned 1220-0109 as the survey's control number. This control number expires on 08/31/2027. Without OMB approval and this number, we would not be able to conduct this survey. If you have any comments regarding this survey or recommendations for reducing its length, send them to the Bureau of Labor Statistics, National Longitudinal Surveys, 2 Massachusetts Avenue, N.E., Washington, DC 20212.</i></p> <p><i>The Bureau of Labor Statistics, its employees, agents, and partner statistical agencies, will use the information you provide for statistical purposes only and will hold the information in confidence to the full extent permitted by law. In accordance with the Confidential Information Protection and Statistical Efficiency Act (44 U.S.C. 3572) and other applicable Federal laws, your responses will not be disclosed in identifiable form without your informed consent.</i></p> <p><i>BLS may release records to a contractor to compile non-individually identifiable data for use by the general public and federal agencies for research purposes. BLS may provide geographic information to researchers to conduct specific research projects which further the mission and functions of the agency. Such authorized researchers must sign a written agreement making them official agents of the Bureau of Labor Statistics and requiring them to protect the confidentiality of survey participants. These researchers are never provided with the personal identities of participants.</i></p> |
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### Themed Reminder Email 3 (Example: Happy New Year)

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| Subject        | Happy New Year from NORC – A kind reminder to complete your NLSY97 survey                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Email language | <p>Greetings from the NLSY97,</p> <p>Previously, we emailed you and sent you a letter about your NORC interview. It's not too late to receive \$XX for completing. For more than 25 years, the NLSY97 has provided vital information about the lives of Americans in your generation. Few surveys can match the NLSY97 in helping us understand who we are as a nation. And for that, we thank you.</p> <p>You can schedule your appointment today by replying to this email, calling 877-504-1086 or sending a text message to 312-835-1905.</p> |

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|  | <p>To schedule your appointment online, enter your PIN, [PIN], at <a href="https://nlsy97appointments.norc.org">nlsy97appointments.norc.org</a> to set your interview at your preferred date and time.</p> <p>Don't miss your chance to make a lasting contribution. Thank you, and we look forward to your continued participation in this important study!</p> <p>Sincerely,<br/>The NLSY97 Team<br/>NORC at the University of Chicago</p> |
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### Final Push Offer (and increase in the payment incentive)

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| Subject        | New! Higher bonus available for completing the NLSY97 Survey!                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Email language | <p>It's not too late to participate in the NLSY97 this year. <b>Because your participation is so important, we've increased your gift and are now offering you \$XX</b> to complete your interview, which takes about an hour on average to complete.</p> <p>The study is not complete without your input! Please schedule your interview today. Call us toll-free at 1-877-504-1086 or reply to this email to schedule an appointment with your interviewer. We can work around your schedule to complete your interview whenever is convenient for you.</p> <p>To schedule your appointment online, enter your PIN, [PIN], at <a href="https://nlsy97appointments.norc.org">nlsy97appointments.norc.org</a> to set your interview at your preferred date and time.</p> <p>We hope to hear from you soon!</p> <p>Sincerely,<br/>The NLSY97 Team<br/>NORC at the University of Chicago</p> |

### Themed Reminder Email 4 (Example: Spring theme)

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|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Subject        | Spring is here- Time to complete your NLSY97 Survey                                                                                                                                                                                                                                                                                                                        |
| Email Language | <p>Greetings from the NLSY97,</p> <p>We hope this message finds you well and enjoying nice weather where you live. We're wondering if it would be possible to conduct your NORC interview sometime this week or this coming weekend. When would you have about an hour to chat by phone?</p> <p>As a long-time participant in the NLSY97 study, you perform a valuable</p> |



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|  | <p>service to your community. By sharing your story, you enrich researchers' understanding of how family, education, and labor interact in the daily lives of Americans.</p> <p>Your information is very important to us, and we want to make it as easy as possible for you to participate in our study, so call us toll-free at 1-877-504-1086 or reply to this email to set an appointment with your interviewer.</p> <p>To schedule your appointment online, enter your PIN [PIN] at <a href="https://nlsy97appointments.norc.org">nlsy97appointments.norc.org</a> to set your interview at your preferred date and time.</p> <p>You will receive [Total fee] to thank you for your participation by either electronic payment or cash, as you choose.</p> <p>Thank you for your time, and hope to hear from you soon.</p> <p>Sincerely,<br/>The NLSY97 Team<br/>NORC at the University of Chicago</p> |
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### Themed Reminder Email 5 (Example: Summer theme)

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| Subject        | Don't let summer pass you by- Time to complete your NLSY97 Survey                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Email Language | <p>Greetings from the NLSY97,</p> <p>We wanted to remind you that it is not too late to complete your NLSY97 survey! Take a break from the heat and schedule an appointment with a professional interviewer to take your survey before it is too late! We will be calling soon to schedule your interview sometime in the next two weeks.</p> <p>Because of your past participation, you've had a direct impact on the way our society understands some of the most critical issues impacting our country. Thanks for these contributions in the past, and don't forget that it's not too late to share your story this year.</p> <p>To schedule your appointment, simply reply to this email, or call 1-877-504-1086. To schedule your appointment online, enter your PIN, [PIN], at <a href="https://nlsy97appointments.norc.org">nlsy97appointments.norc.org</a> to set your interview at your preferred date and time. You will receive [TOTAL FEE] to thank you for your participation.</p> <p>Sincerely,<br/>The NLSY97 Team<br/>NORC at the University of Chicago</p> |

### Last Chance

|                |                                                                        |
|----------------|------------------------------------------------------------------------|
| Subject        | It's your last chance to receive [Fee] for completing the NLSY survey! |
| Email language | As we head towards autumn, we are beginning to wind down interviews    |

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|  | <p>on the NLSY97. This is your <i>last chance</i> to complete your survey this round and receive [FEE] as a token of our appreciation.</p> <p>You can do the interview on the phone in about an hour, on average. Feel free to call 1-877-504-1086 anytime, or respond to this email to set your appointment.</p> <p>To schedule your appointment online, enter your PIN, [PIN], at <a href="https://nlsy97appointments.norc.org">nlsy97appointments.norc.org</a> to set your interview at your preferred date and time.</p> <p>Because of your participation, you've had a direct impact on the way our society understands some of the most critical issues impacting our country. Thanks for your contribution! I hope to hear from you soon.</p> <p>Sincerely,<br/>The NLSY97 Team<br/>NORC at the University of Chicago</p> |
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## Responding to email contacts initiated by the Respondent:

### Appointment Reminders

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|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Subject        | Survey Appointment Reminder for NLSY                                                                                                                                                                                                                                                                           |
| Email language | <p>Thanks for scheduling your NLSY97 interview! Your interview is scheduled for<br/>DATE<br/>TIME</p> <p>Please contact us by replying to this email, calling us toll-free at XXX-XXX-XXXX or sending a text message to XXX-XXX-XXXX if you need to re-schedule. We look forward to talking with you soon!</p> |

### Contact Confirmation

|                |                                                                                                                                                                                                                                                                                                        |
|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Subject        | Thank you for contacting the NLSY97 survey                                                                                                                                                                                                                                                             |
| Email language | <p>Thank you for your email! The NLSY97 team is receiving messages every day and making sure your message is delivered to the right person. If you have requested an appointment or asked a question about your survey participation, you should expect to receive a reply within 3 business days.</p> |

## Individual Emails sent by the Field Interviewer (FI)

Where Mass emails are intended to get the respondent to contact the program in general, individual emails sent by the FI to the respondent are intended as an introduction to their FI, i.e. to get a 'foot in the door.' The hope that these more personalized emails will garner a reply so the FI can continue to interact with the respondent, answer any questions, and finally secure that interview. If a respondent does reply to emails, the FI is given latitude to answer their questions and attempt to schedule an interview.

Mass emails are sent at scheduled times which are marked in the Case Management System so FIs do not reach out by personal email near the same time.

#### **FI Guidelines for Communicating with Respondents or Respondent Contacts by Email**

- All email correspondence must be made using the NORC provided email accounts
- Your first email must follow the script provided. After contact has been established via email, you are not obligated to use the scripts provided.
- Summaries of any emails sent to/received from respondents or contacts must be entered in the case management system
- Never associate the SU\_ID (case ID)
- Do not use email to discuss anything confidential
- **Only send emails from your NORC project laptop using your NORC email account.**
- Proofread all email before sending it and use Spell-Check
- Always include the project toll-free number or your FM's toll-free number
- Do not write in ALL CAPITALS

## **Individual Emails Scripts**

**Note,** all emails will include the following language:

*If you believe you are not the intended recipient of this message, please notify the sender and delete this email without disclosing, copying, or further disseminating its contents.*